

## **2005 SURVEYOR USER'S GUIDE**

## TABLE OF CONTENTS

### SECTION I

#### GETTING STARTED

1.1 Introduction.....	4
1.2 Due Date .....	4
1.3 System Requirement .....	5

### SECTION II

#### INSTALLING SURVEYOR AND RETRIEVING THE SURVEY

2.1 Installing Surveyor On Your Computer.....	5
2.2 Installing Surveyor on a Network .....	6
2.3 Retrieving Your Survey Forms and Data.....	6

### SECTION III

#### WORKING WITH THE SURVEYOR'S FORM INBOX

3.1 Checking for Updates .....	8
3.2 Opening a Form .....	8
3.3 How Do I Sort in the Form Inbox? .....	9
3.4 Arranging Columns in the Form Inbox.....	9
3.5 Adding Establishments/Locations .....	9
3.6 Deleting Added Establishments/Locations .....	10
3.7 Hide/Unhide Columns .....	10
3.8 Printing a Form .....	10
3.9 Lock Status.....	11
3.10 Submitting Your Responses.....	11
3.11 Toolbar and Menus .....	12

### SECTION IV

#### WORKING WITH YOUR SPREADSHEET

4.1 What Can I Import? .....	14
4.2 Importing and Exporting Data .....	15
4.3 Importing/Exporting With the Census File Number.....	16
4.4 Importing/Exporting With the Store/Plant Number.....	26
4.5 Importing Product Codes .....	35
4.6 Importing Data into Surveyor .....	36
4.7 Leading Zeros in Exported Data .....	38
4.8 Copy/Distribute Using Exported File .....	39

### SECTION V

#### WORKING WITH YOUR FORMS USING SURVEYOR

5.1 Archiving Your Responses .....	44
5.2 Certification .....	44
5.3 Checking a Form for Errors .....	44

5.4 Gathering Responses from Other People in Your Company .....	45
5.5 Reporting Dollar Figures .....	45
5.6 Major Activity Codes (Item 5B) .....	46
5.7 Operational Status Codes .....	46
5.8 Remarks Section .....	47
5.9 Reviewing Your Responses .....	47
5.10 Saving Your Responses .....	47
5.11 Printing Survey Forms .....	47
 SECTION VI	
SURVEY FORMS	
6.1 General Information .....	48
6.2 Report of Organization Survey .....	48
6.2.1 Form NC-99001 (Items 1-4 Instructions) .....	48
6.2.2 Form NC-99002 (Item 5A) .....	49
6.2.3 Form NC-99003 (Item 5B) .....	52
6.3 Annual Survey of Manufactures .....	54
Form MA-10000 and MA-10001 .....	54
 SECTION VII	
CONTACT INFORMATION	
7.1 Software/Technical Assistance .....	66
7.2 Non-Technical Assistance .....	66
 SECTION VIII	
BUSINESS HELP SITE	
8.1 On-line Services .....	67
8.1.1 Filing Status .....	67
8.1.2 Re-mailing Forms .....	67
8.1.3 Time Extensions .....	67
8.1.4 Frequently Asked Questions .....	67
 SECTION IX	
SURVEY SECURITY	
9.1 Internet Security .....	68
9.2 Title 13, U.S. Code .....	69
9.3 Warning Concerning Electronic Mail .....	71
 APPENDICES	
APPENDIX A IMPORT ERRORS AND WARNINGS .....	72
APPENDIX B GLOSSARY OF TERMS .....	75
APPENDIX C STATE ABBREVIATIONS .....	78
APPENDIX D SURVEYOR FAQs .....	79
APPENDIX E TROUBLESHOOTING .....	81

## SECTION 1: GETTING STARTED

### Introduction

Welcome to the 2005 Report of Organization and Annual Survey of Manufactures!

This manual is a tool for you to refer to as you are completing the Report of Organization and/or the Annual Survey of Manufactures (ASM). It was designed with YOU in mind. We understand and strive to reduce a respondent's reporting burden and therefore, hope to do so by providing you with an on-hand tool to guide you while you're completing the survey(s).

**YOUR RESPONSE IS REQUIRED BY LAW.** Title 13, United States Code, requires businesses and other organizations that receive this questionnaire to answer the questions and return the report to the Census Bureau. By the same law, **YOUR CENSUS REPORT IS CONFIDENTIAL.** It may be seen only by persons sworn to uphold the confidentiality of Census Bureau information and may be used only for statistical purposes. Further, copies retained in respondents' files are immune from legal process.

The reporting unit for this form is an establishment. See the Glossary of Terms (Appendix B) for a definition of establishment and other terms.

To make it easier for you to complete your survey forms, we have prelisted selected information that you have previously provided to the Census Bureau. Please list all other establishments of your organization in Item 5B (Form NC-99003). Do not duplicate establishments already prelisted. Be sure to include form NC-99001 when returning your completed survey(s). Before completing these forms, please view the glossary of terms and read the enclosed instructions that accompany every question (Item).

### 1.2 DUE DATE

Both surveys are due **thirty days** upon receipt. When you have completed the surveys, send your responses electronically to the Census Bureau via Internet or by mail-in diskette (see Submitting Your Responses in Section 3.10). If you are unable to complete the surveys by the due date and would like a time extension, please visit our Business Help Site at [www.census.gov/econhelp](http://www.census.gov/econhelp). Click on Report of Organization or Annual Survey of Manufactures, then click on Online Services. Follow the on-screen instructions or call 1-800-838-2640 to request a time extension.

## 1.3 SYSTEM REQUIREMENTS

### Minimum System Requirements

Windows 98 or later  
Pentium II or equivalent  
64 MB Memory  
20 MB free hard drive space  
Dial-up Connection  
Microsoft Internet Explorer or Netscape 4.0 or above (128-bit encryption)

### Recommended System

Windows 2000 or later  
Pentium III or equivalent  
256 MB Memory  
100 MB free hard drive space  
Broadband Internet

## Section 2: INSTALLING SURVEYOR AND RETRIEVING THE SURVEY

### 2.1 Installing Surveyor On Your Computer

To install the Surveyor software on your computer via the Internet:

- Go to our Business Help site, located at [www.census.gov/econhelp](http://www.census.gov/econhelp).
- Select Report of Organization or Annual Survey of Manufactures.
- Click on Electronic Reporting.
- Follow the instructions to download and save the software.
- To install the software from Windows, click Start.
- Select the Run option
- Type or browse to the folder of the downloaded software (Example: C:\Temp\GIDS\_Surveyor\_Setup.exe).
- Click OK.
- Follow the on-screen instructions

To install the Surveyor software on your computer via CD-Rom:

- Insert CD-ROM
- Click Start
- Choose the “Run” option
- Click on Browse
- Click on D: (or the drive where your CD-Rom is located)
- Select GIDS\_Surveyor\_Setup
- Click Open
- Click OK
- Follow the instructions on the screen

If you already have Surveyor installed, select **Tools| Check for Updates** and follow the instructions in order to install the latest version of Surveyor. (See Section 3.1)

To enter the software:

From Windows click Start

Click on Programs | U.S. Census Bureau | Surveyor

## **2.2 Installing Surveyor on a Network**

Follow these instructions to install the Surveyor software onto a network drive:

1. The first person must install the Surveyor on the Network drive by changing the default folder to a folder on the Network. This person downloads the forms and prelisted data by entering the username and password of the company. The username and password are case-sensitive, so enter it as it appears.
2. Each other person must install the Surveyor software onto the PC in the default directory:
  - Answer “No” to Retrieve new survey
  - Click on Tools | Change Data Folder Location
  - Type the name of the folder or click the folder button to browse to find the folder on the Network drive where the Surveyor software data was placed. Example:  
V:\Census\Surveyor
  - Click “Next”
  - Do not select “Copy data files to new location.”
  - Click “Finish”
  - Click “Close”
3. The Form Inbox should now show the data files on the Network drive.

## **2.3 Retrieving Your Survey Forms and Data**

If your Form Inbox contains no forms, an “Information” dialog box will appear, noting that you have no surveys installed and asking if you want to download survey data from the Internet now.

Select “Yes,” and the “Retrieve Survey Data Wizard” will open. The “Wizard” will ask you to check if you are connected to the Internet and if you have the “User ID” and “Password” that were supplied to you by the Census Bureau, in the cover letter or label of your report forms. If these conditions are met, click “Next.” Select the survey you are going to work on and type in the ID and password on the following screen and click “Next.” Be sure to type the ID and password as you see it. They are case sensitive.

Survey data will begin downloading, and you will receive a “Download Complete” message when this process is completed. If survey data does not download, try the process again or call 1-800-838-2640, between 7:30 a.m. and 4:00 p.m., Eastern Time, Monday through Friday.

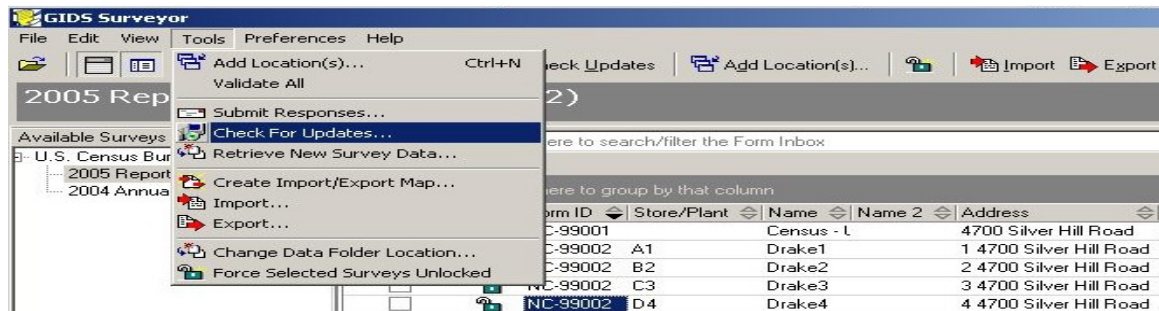
### Section 3: WORKING WITH THE SURVEYOR’S FORM INBOX

The Form Inbox is the area of the Surveyor where you can access your company’s forms. You have the capability of viewing your locations, sorting your locations, viewing errors and warnings, checking for updates, adding locations, creating a spreadsheet, and many other functions covered by this manual in the next few sections.

Selected	Status	Form ID	Store/Plant	Name	Name 2	Address	City	State	Zip	EIN	NAICS	CFN
<input type="checkbox"/>		NC-99001		Census - L		4700 Silver Hill Road	Suitland	MD	20746-6100	-		8057E
<input type="checkbox"/>		NC-99002 A1		Drake1		1 4700 Silver Hill Road	1 Suitland	MD	20747-0000	01-0000001	18385687	23501
<input type="checkbox"/>		NC-99002 B2		Drake2		2 4700 Silver Hill Road	2 Suitland	MD	20747-0000	01-0000001	10876398	2723E
<input type="checkbox"/>		NC-99002 C3		Drake3		3 4700 Silver Hill Road	3 Suitland	MD	20747-0000	01-0000001	13277801	25941
<input type="checkbox"/>		NC-99002 D4		Drake4		4 4700 Silver Hill Road	4 Suitland	MD	20747-0000	01-0000001	14236260	2458E
<input type="checkbox"/>		NC-99002 E5		Drake5		5 4700 Silver Hill Road	5 Suitland	MD	20747-0000	01-0000001	19772710	2042C
<input type="checkbox"/>		NC-99002 F6		Drake6		6 4700 Silver Hill Road	6 Suitland	MD	20747-0000	01-0000001	17471837	2053E
<input type="checkbox"/>		NC-99002 G7		Drake7		7 4700 Silver Hill Road	7 Suitland	MD	20747-0000	01-0000001	10675061	2124E

### 3.1 Checking for Updates

The first time that you open Surveyor, a pop-up “Check for new updates” dialog box will appear. You should select “Yes.” This will open the “Surveyor Update Wizard.” (While in the Form Inbox, you also can check for updates at any time by clicking on the “Check Updates” icon or selecting the “Check for Updates” option in the “Tools” drop-down menu.)



Before checking for updates, make sure your computer currently has a “live” connection to the Internet.

After a few seconds, the “Wizard” will report if “Updates” are needed or not.

Click the “Finish” button in the “Wizard” to complete the update process.

### 3.2 Opening A Form

To open a form and begin entering or verifying data, (1) double-click on any column in the row of the form’s data (except the store number) in the Form Inbox, (2) highlight any of the form’s column data and select File | Open Current from the drop-down menu, or (3) highlight any of the forms column data and click on the open folder icon (in the upper left-hand corner of the Form Inbox).

Use the scroll bars to move up or down or from left to right in the form view on your screen. (The entire view for an “Item” or question may not otherwise be visible.)

You can have multiple forms “Open” at one time, although when using Surveyor on a network, only one user can “Open” or access a given form at any single point in time.



### 3.3 How do I sort in the Form Inbox?

#### Sorting

To sort a column in the Form Inbox alphabetically or numerically, just click the column heading to sort in ascending order (i.e. 1,2,3 and A, B, C) or descending order (Z, Y, X and 99, 98, 97).

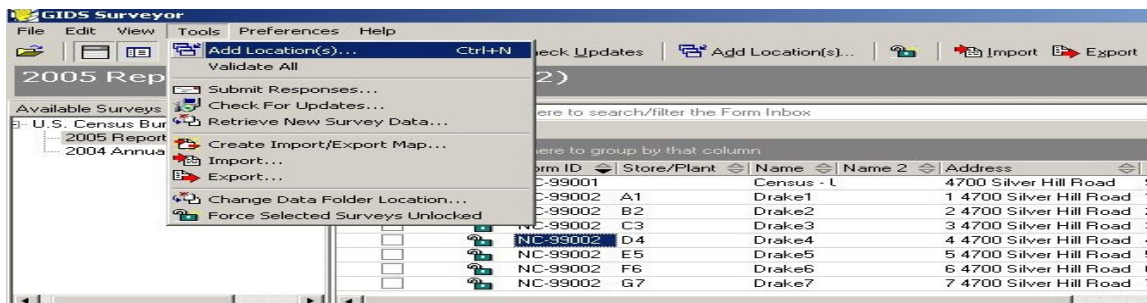
### 3.4 Arranging Columns in the Form Inbox

The default Form Inbox view contains column headings, starting on the left-hand side with “Selected” and ending on the right-hand side with “Submitted By.” If you would like to change the order of columns and column data, click and hold on a column heading, then drag it and drop it in the desired new location. All of that column’s data will follow the heading to the new location.

**Note:** Surveyor will not export your sorted order, but it will export selected establishments in isolation when that option is selected during export. (See Section 4.3B).

### 3.5 Adding Establishments/Locations

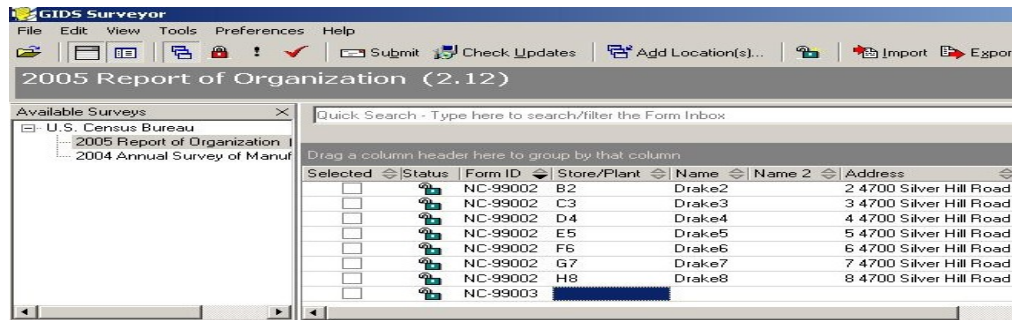
To add a location (form NC-99003) in the Form Inbox, click on the “Add Locations” icon on the toolbar, or select **Tools | Add Locations(s)...** from the drop-down menu.



- Highlight the form type NC-99003,



Put the Number of NC-99003s that you would like to add in the **Number** box. If you have five locations to add, put “5” in the **Number** box, and press **Add**. The new locations will appear as the last locations within the Form Inbox.



- Enter a unique *Store/Plant* number within *Surveyor* for each new NC-99003. Enter the new *Store/Plant* number to the *Store/Plant* column in the Form Inbox. If you intend to use the *Census File Number* (CFN) Map, the unique *Store/Plant* number is not necessary. You do not necessarily need to enter name, address, or other information at this point, for that information can be imported from a spreadsheet later.

### 3.6 Deleting Added Establishments/Locations

**Note:** Deleting an establishment is a permanent action. Proceed with caution.

You can **ONLY** delete locations/establishments you have added (via Form 99003) in the Form Inbox. If you want to delete added establishments, select the establishment(s) by clicking in the checkbox to the left of the establishment's name in the Form Inbox. Select **Edit | Delete Selected Establishments...** from the drop-down menu and follow the instructions provided in the "Delete Establishments Wizard".

### 3.7 Hide/Unhide Columns



The default Form Inbox view contains column headings, starting on the left-hand side with "Selected" and ending on the right-hand side with "Submitted By." To hide any of these columns and the data listed in them, select **Preferences | Show/Hide Columns** from the drop-down menu. In the "Show Columns" dialog box, uncheck the box(es) for the column heading(s) you wish to hide.








To restore a column heading and its data in the Form Inbox, select **Preferences | Show/Hide Columns** from the drop-down menu. In the "Show Columns" dialog box, check the box(es) for the column heading(s) you wish to restore.

### 3.8 Printing A Form

You can print any form at any state of its completion by selecting **File | Print** from the drop-down menu while the form is open. Surveyor will print the form data through your printer. The printout will replicate the corresponding paper report form. For additional information, refer to Section 5.11.

### 3.9 Lock Status

In the Form Inbox, a red lock icon  in the “Status” column (the second column in the default view) indicates that a form already is “in use” and “opened” either on a user’s own desktop or by another computer on a shared drive. The “opened” form must be closed in order to “unlock” it and make the form available to be re-opened. To unlock a form, select it/select all go to **Tools | Force Selected Surveys Unlocked** and follow the wizard’s instructions. When the form is closed or the locked form(s) is/are successfully unlocked by the respondent, a green “open” or “unlocked” icon  usually appears in the “Status” column. You may also encounter the import lock, shown below, when the Surveyor software is abruptly exited during the

2005 Report of Organization (2.12)							Form
Available Surveys		Quick Search - Type here to search/filter the Form Inbox					
U.S. Census Bureau							
2005 Report of Organization		Drag a column header here to group by that column					
Selected	Status	Form ID	Store/Plant	Name	Name 2	Address	City
<input type="checkbox"/>		NC-99001		Census - Users Guide		4700 Silver Hill Road	Suil
<input type="checkbox"/>		NC-99002	A1	Drake1		1 4700 Silver Hill Road	1 S
<input type="checkbox"/>		NC-99002	B2	Drake2		2 4700 Silver Hill Road	2 S
<input type="checkbox"/>		NC-99002	C3	Drake3		3 4700 Silver Hill Road	3 S
<input type="checkbox"/>		NC-99002	D4	Drake4		4 4700 Silver Hill Road	4 S
<input type="checkbox"/>		NC-99002	E5	Drake5		5 4700 Silver Hill Road	5 S
<input type="checkbox"/>		NC-99002	F6	Drake6		6 4700 Silver Hill Road	6 S

Import process. If you encounter this, go to **Edit | Check All**, and unlock it the same way as the red lock icon. If the Surveyor does not show that the location is unlocked, try double-clicking on the form and the view should adjust.

### 3.10 Submitting Your Responses

Once you have completed all your forms and cleared any errors, you may certify and submit your responses. To submit one or more completed forms, select **Tools | Submit Responses** from the drop-down menu in the Form Inbox, or click the “Submit” icon on the tool bar. Either option will open the Response Submission Wizard, which will guide you through the submission process. The Wizard will also notify you of any problems with forms you wish to submit, if they exist. The Wizard will prevent you from submitting forms with errors. It will notify you of warnings if you have errors, but allow submission of forms.

There are two different methods to submit your responses to the Census Bureau. You can select either “Send Response Via Diskette” or “Submit Via the Internet”. The Wizard will ask what you would like to submit. You can select either to “Submit All Sectors”, “Submit Selected Sectors”, or “Submit Individual Forms”. “Submit Selected Sectors” will submit either all of your Report of Organization or ASM forms. Selected individual forms are for MA-10000 forms only. If you choose “Submit Individual Forms”, click on one or more of the forms shown in the display box. Click on boxes to de-select, also. Scroll up and down through the box to see all possible forms.

## Submitting via Diskette

The “Wizard” will display a “Submit Via Diskette” screen. Use the drop-down menu at the bottom of the “Wizard” screen to select which drive (A, C, D, etc.) to store your file. If the response file is too large for a diskette, you may send us a CD-Rom.

After form copying is completed, the “Wizard” will ask you to mail the diskette to:

U.S. Census Bureau  
Attn: DSB – Bldg. 61A  
1201 East 10<sup>th</sup> Street  
Jeffersonville, IN 47132-0001

You can click the “Print” button on the lower left-hand corner of the “Wizard” screen to print out this address.

Please mail the diskette(s) in a diskette mailer or other protective packaging.

Click the “Finish” button at the bottom of the “Wizard” screen to complete the submission process.

## Submitting via Internet

This will take you to a “Ready to Submit” screen. Click the “Next” button at the bottom of the screen, and the “Wizard” will display a “Submit Via Internet” screen. On this screen, enter the “User ID” and “Password” that were supplied to you when you received your copy of Surveyor and your Census forms.

After entering your “User ID” and “Password”, click the “Submit” button.

The “Wizard” screen will display a “Response Received” message if your submission was received. Click the “Finish” button to end the submission process.

Checking the Form Inbox, you now should see in the “Last Submitted” and “Submitted By” columns the updated time of submission and the identity of the user or computer that submitted this response.

## 3.11 Toolbar and Menus

This is the toolbar that you will find in the Form Inbox of the Surveyor software.

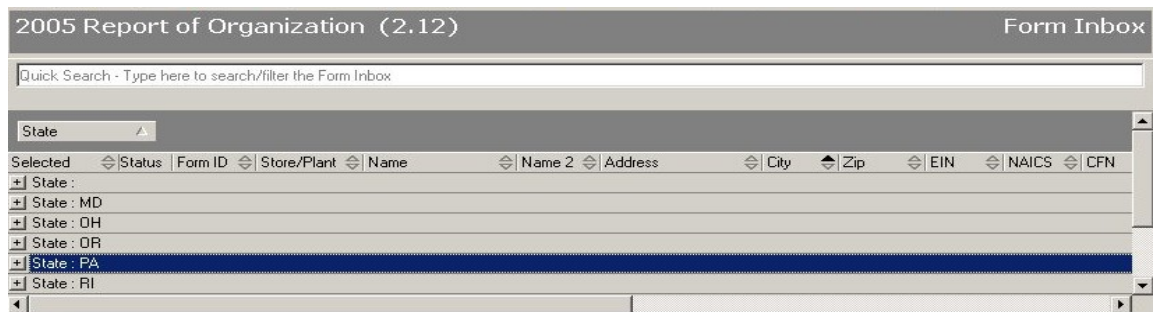


## **Open**

You can open a form in the Form Inbox by clicking on the Form ID and then the opened folder icon on the toolbar.

## **Group Panel**

You can use this option to organize your locations in the Form Inbox by grouping them. For example, you can drag column headers into the gray area above the Form Inbox.



In the above screenshot, “State” was chosen to group the locations. Surveyor alphabetically grouped each location by state. You can click on the ‘+’ and the ‘-’ signs to view the locations. To restore the Inbox to its original state, simply drag the column heading back towards the heading area.

## **View|Survey List**

Clicking on this icon once will display the Form Inbox without the survey panel on the left. Clicking the icon again, will display the Form Inbox with the survey panel on the left.

## **View All Establishments**

Allows you to view all of your establishments in the Form Inbox.

## **View Locked/Distributed Establishments**

Allows you to view all establishments that are locked.

## **View Establishments With Errors**

Allows you to view, only, those establishments that have errors in data that has been entered.

## **View Selected Establishments**

Allows you to view all establishments that have a 'check mark' in the selected field of the Form Inbox.

### **Tools|Submit Responses**

Will take you to the Submit Responses Wizard to start the process of transmitting your data to the Census Bureau.

### **Tools|Check for Updates**

Will assist you in downloading updates to the forms required to fill out surveys. The Surveyor defaults to check for updates on a biweekly basis. However, you can change this setting by selecting another time period, when prompted.

### **Tools|Add Location(s)**

Will allow you to add Form NC-99003 (Item 5B, Report of Organization) to your Form Inbox for new or "missing" establishments.

### **Tools|Override Lock**

This will take you to the Force Unlock Wizard. The wizard allows you to force one or more locked forms unlocked. (See Section 3.9)

### **Tools|Import**

Will take you to the Surveyor Importing Wizard. This action will allow you to transfer your data from a spreadsheet to the electronic forms in the Surveyor software. (See Section 4.2).

### **Tools|Export**

Will take you to the GIDS Export Wizard and thus the process of creating a spreadsheet from the data in your electronic forms. (See Section 4.2)

### **Exit**

Will close the Surveyor software program.

## **Section 4: WORKING WITH YOUR SPREADSHEET**

### **4.1 What Can I Import?**

You can ONLY import the following survey forms:

**NC-99002 (Item 5A)**

**NC-99003 (Item 5B)**

**MA-10000 (MA-10000)**

**Note:** MA-10000 Item 22 will need to be imported separately from the rest of the form. MA-10001 cannot be imported/exported.

You will be unable to import the NC-99001 (Items 1 - 4) or NC-99530 (Ownership or Control). These forms must be completed manually.

## 4.2 Importing and Exporting Data

Regardless of the spreadsheet that is used, there are specific data requirements<sup>1</sup> that must be followed.

### Introduction

The Census Bureau's *Surveyor* software lets you import information from your own spreadsheets. If you have a large number of stores, importing the data from one or more spreadsheets may save you a great deal of time. When importing and exporting, *Surveyor* must have a unique identifier in order to communicate information to and from the exterior spreadsheet format. We call that unique identifier the Import Index.<sup>2</sup> *Surveyor* can use the *Census File Number* (RECORD\_CFN) or the *Store/Plant* number (RECORD\_STORENUM) as the Import Index.

**Note 1:** If you only need to enter information for a single location or a few stores, it is usually less time-consuming to enter the information by entering individual forms and manually entering the data.

**Note 2:** There is a default import procedure built into *Surveyor*, but the procedure requires the specific column specifications (see footnote 1) produced during the default export procedure.

*Surveyor* can import data from any spreadsheet if each row in the spreadsheet is associated with a separate establishment, each establishment has an Import Index, and the spreadsheet's Import Index matches the *Surveyor's* Import Index.

1. You may use any software that allows you to create a file in .xls (e.g., Excel) or .csv (comma-separated values ASCII) format.
2. Be sure to include a column for the Import Index. This is what we will be using to merge the information into *Surveyor*.
3. Everything does not have to fit in one spreadsheet. You can import multiple spreadsheets.

---

<sup>1</sup> For the Report of Organization, go to [www.census.gov/econhelp/Report](http://www.census.gov/econhelp/Report) of Organization/Additional Notes. For the Annual Survey of Manufactures, go to [www.census.gov/econhelp/Annual](http://www.census.gov/econhelp/Annual) Survey of Manufactures/Additional Notes.

<sup>2</sup> The Import Index is a unique alpha, numeric, or alphanumeric characteristic for each location. It is used to match the individual locations in *Surveyor* and the spreadsheet during the transfer of data. During Export each location with an Import Index will be produced in the spreadsheet that is created, and during import, *Surveyor's* Import Index is matched to the Spreadsheet's Import Index in order to correctly communicate the transfer of data.



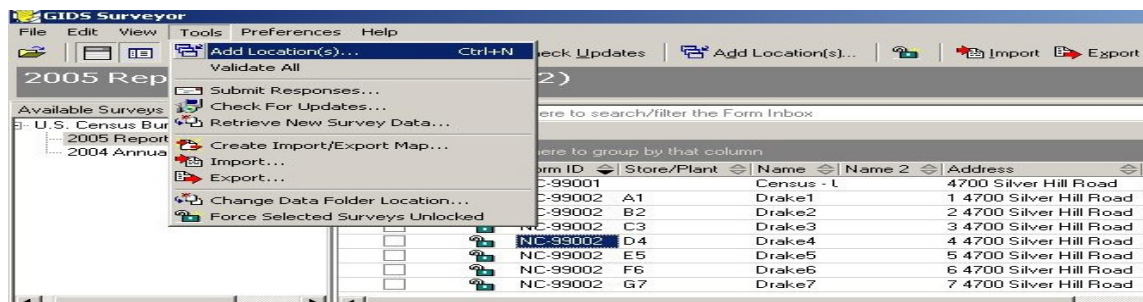
4. Do not skip rows. Once *Surveyor* reaches an empty row (or a column without something in Row 1), the import process is over.
5. All Columns that are mapped will update during import, but an empty spreadsheet cell<sup>3</sup> will not change the original value in *Surveyor*.<sup>4</sup>
6. You may wish to create a practice spreadsheet with only a few columns and rows. Then, import the mini spreadsheet to make sure that you have perfected the process.
7. Item 22 on the Annual Survey of Manufactures must be imported independently from the rest of the Form as a sequence (See Section 4.5).

### 4.3 Importing/Exporting With the *Census File Number*

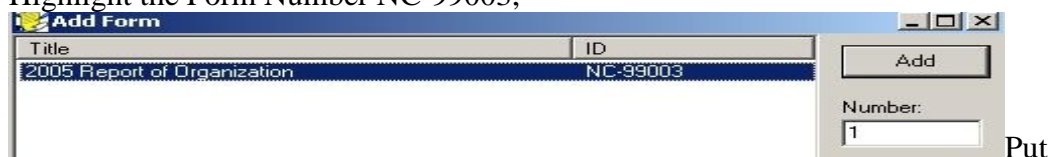
**Note:** There are default *Census File Number* maps in *Surveyor*.<sup>5</sup>

#### A. Verify the Form Inbox:

Every location pre-listed in *Surveyor*'s Form Inbox has a *Census File Number (CFN)*. In order to account for new locations/more locations (NC-99003), select **Tools | Add Locations**



- Highlight the Form Number NC-99003,



the number of NC-99003s that you would like to add in **Number**. If you have five locations to add, put "5" in **Number**, and press **Add**. The new locations will appear with new *CFNs* as the last locations within the Form Inbox.

- The new forms will have *Census File Numbers*.

<sup>3</sup> A spreadsheet cell is a unique location on the spreadsheet such as: Column (A) Row (1) or Column (B) Row (1).

<sup>4</sup> If I attempt to import a void value for a specific location's data, the void value will not overwrite the original name; a blank spreadsheet cell will not delete the original value from the *Surveyor* Form, a spreadsheet cell with a spacebar in it will replace the current value in *surveyor* with a space.

<sup>5</sup> *CFN Map 1 – Report of Organization (NC-99002 and NC-99003)* is for the Report of Organization. *CFN Map 2 – Annual Survey of Manufactures General Questions (MA-10000)* is for MA-10000s' Items 1-15 and Item 29. *Map 3 – Annual Survey of Manufactures Product Class (MA-10000 – Item 22)* is only for Item 22; Item 22 is for the product data.

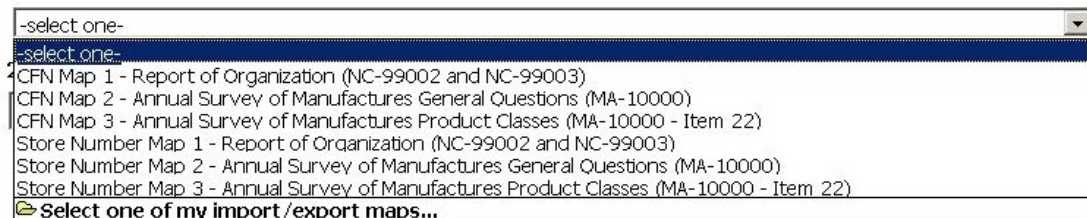


## B. Create a Spreadsheet of your locations

- Select **Tools | Export**, and select **Next**. You will need to select a map.<sup>6</sup>

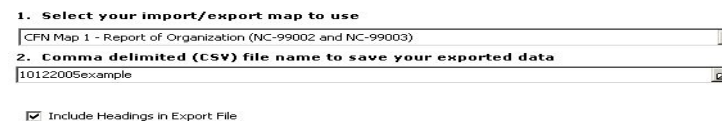
Note: Unless a Census supplied default map is used, NC-99002 and NC-99003 will have to be imported independently. (See footnote #10 and/or note at the end of mapping procedure.

### 1. Select your import/export map to use



7

Once the correct map is selected, the spreadsheet you wish to export to must be designated.



- The folder under **2. Comma delimited...** allows a user to browse in order to designate a location where the spreadsheet will be created. Just click the folder all the way on the right. Once the location is selected, give the file a name.<sup>8</sup>
- Select **Next**, and you will have to designate which forms are to be exported.<sup>9</sup> The following will appear.

<sup>6</sup> Maps are just used to communicate the data between the software.

<sup>7</sup> If you are only completing the Report of Organization, you will only have the Report of Organization Maps. Similarly, if you only have the Annual Survey of Manufactures complete, you will only have the Annual Survey of Manufactures default maps. Use one of the Annual Survey of Manufactures Product Classes Maps to complete Item 22, and use of the Annual Survey of Manufactures General Questions Maps for all other question.

<sup>8</sup> Surveyor only exports .csv, but cannot import .xls or .csv.

<sup>9</sup> The Forms need to match the map. If the map is The Report of Organization, the appropriate Forms are NC-99002 and NC-99003. The appropriate Form for The Annual Survey of Manufactures export/import is MA-10000.

**Export All Forms** can be used if the Form Inbox exclusively has the Report of Organization or exclusively has the Annual Survey of Manufactures.

Selected	Status	Form ID	Store/Plant	Name	Name 2	Address
<input checked="" type="checkbox"/>		NC-99001		Census - Users Guide		4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	A1	Drake1		1 4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	B2	Drake2		2 4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	C3	Drake3		3 4700 Silver Hill Road

- Do not attempt to Export all locations if you are completing more than one Survey.<sup>10</sup> NC-99002 and NC-99003 can be exported together as long as the default map is used.

**Export All Forms of Type** allows the user to select a Form Number<sup>11</sup> for export. This selection is good to use when there are multiple Form Numbers within the Form Inbox, and you wish to export all the locations associated with a specific Form Number.

Selected	Status	Form ID	Store/Plant	Name	Name 2	Address
<input checked="" type="checkbox"/>		NC-99001		Census - Users Guide		4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	A1	Drake1		1 4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	B2	Drake2		2 4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	C3	Drake3		3 4700 Silver Hill Road

The Form Number must coincide with the Map that was selected.<sup>12</sup>

- Use **Export Selected Forms** to isolate specific locations of common Form Number in order to export a parsed spreadsheet, or you may export individual locations.

Selected	Status	Form ID	Store/Plant	Name	Name 2	Address
<input checked="" type="checkbox"/>		NC-99001		Census - Users Guide		4700 Silver Hill Road
<input checked="" type="checkbox"/>		NC-99002	A1	Drake1		1 4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	B2	Drake2		2 4700 Silver Hill Road
<input checked="" type="checkbox"/>		NC-99002	C3	Drake3		3 4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	D4	Drake4		4 4700 Silver Hill Road

In the above, *Store/Plant* A1 and C3 will export. Only locations with the same Form Number can be successfully exported/imported together.<sup>13</sup>

Click on a Column header (Name, Store/Plant, Address, etc), and Surveyor will sort the locations by that Column.

- Once the Forms have been selected for Export, click **Next | Finish**. After the progress bar fills, select **Close**. The data will be exported from Surveyor into a ".csv" file. Enter Excel, and open the .csv file.<sup>14</sup>

<sup>10</sup> If you export all forms, NC-99001 will not export, and if you export all forms, NC-99530 will not export. The following Forms (NC-99001, NC-99530, and MA-10001) cannot be imported or exported.

<sup>11</sup> Form numbers are NC-99002, MA-10000, etc.

<sup>12</sup> The Form Number selection is limited to Form Numbers within the Form Inbox.

<sup>13</sup> An exception, NC-99002 and NC-99003 can be imported / exported together with either of the Report of Organization default map.

<sup>14</sup> Once the .csv is opened it can be saved as .xls in order to maintain any formatting you may institute.

- If steps A and B above have been followed, you will just need to answer the questions that apply to your organization.
- If steps A and B have been followed, input data into the spreadsheet columns that apply to your organization and import.
- Skip to Section 4.6 if you are using Census default maps to import.
- **Note:** The Surveyor software will not export leading zeros. Please see Section 4.7 to see how to format leading zeros in your spreadsheet.

### C. Working with the Exported Spreadsheet

Report Organization CFN												
	A	B	C	D	E	F	G	H	I	J	K	L
1	RECORD_CF	RECORD_	EIN_NUM	RECORD_	RECORD_	ADDR_ST	ADDR_CT	ADDR_ST	ADDR_ZIF	EMP_MAR	PAY_QTR	PAY_ANNU
2	%INDEX%	Label Stor	Employer	Label Nam	Label Nam	Street Add	City	State	ZIP Code	Total Empl	First Quart	Total Annu
6	2458895007	D4	10000001	Drake4		4 4700 Sil	4 Suitland	MD	2.07E+08			
7	2042050020	E5	10000001	Drake5		5 4700 Sil	5 Suitland	MD	2.07E+08			
8	2053586340	F6	10000001	Drake6		6 4700 Sil	6 Suitland	MD	2.07E+08			
9	2124535589	G7	10000001	Drake7		7 4700 Sil	7 Suitland	MD	2.07E+08			
10	2767166452	H8	10000001	Drake8		8 4700 Sil	8 Suitland	MD	2.07E+08			
11	ADD0000051											
12	ADD0000052	The index is the CFN (Column (A)).										
13	ADD0000053	The numeric values in Column (A) are for the NC-99002 forms. The Alpha Numeric values in Column (A) are for NC-99003.										
14	ADD0000054											
15	ADD0000055											

- Just add the relevant data to the spreadsheet. See footnote 1 for information on formatting and valid data values.
- If you did not add NC-99003s prior to export, add the relevant data to your exported spreadsheet.
  - Each row is for an individual location.
  - Complete the information for NC-99003, and add a unique index value in Column (A) of the spreadsheet.

Report Organization CFN						
	A	B	C	D	E	F
1	RECORD_CF	RECORD_	EIN_NUM	RECORD_	RECORD_	ADDR_ST
2	%INDEX%	Label Stor	Employer	Label Nam	Label Nam	Street Add
6	2458895007	D4	10000001	Drake4		4 4700 Sil
7	2042050020	E5	10000001	Drake5		5 4700 Sil
8	2053586340	F6	10000001	Drake6		6 4700 Sil
9	2124535589	G7	10000001	Drake7		7 4700 Sil
10	2767166452	H8	10000001	Drake8		8 4700 Sil
11		1	10000001	New Drake1		1452 Silve
12		2	10000001			1453 Silve
13		3	10000001			1454 Silve

- The new locations can be added during import.

See section 4.6 for importing directions.

## D. Create a Custom Census File Number Spreadsheet

If you are trying to match the Form Inbox's data to a spreadsheet you already have, or if you are trying to export the Form Inbox in order to enter the data later, it would be simplest to use the default *CFN* maps found in Surveyor. Imagine that data is organized in a spreadsheet as follows:

template												
	A	B	C	D	E	F	G	H	I	J	K	L
1	EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees	March	Operation Date
2	010000001	Drake1	1 4700 Silver Hill Road	1 Suitland	MD	207470000	A1	400	100		15	1
3	010000001	Drake2	2 4700 Silver Hill Road	2 Suitland	MD	207470000	B2	800	200		5	1
4	010000001	Drake3	3 4700 Silver Hill Road	3 Suitland	MD	207470000	C3	0	0		0	4 01232003
5	010000001	Drake4	4 4700 Silver Hill Road	4 Suitland	MD	207470000	D4	240	60		9	1
6	010000001	Drake5	5 4700 Silver Hill Road	5 Suitland	MD	207470000	E5	400	400		12	1
7	010000001	Drake6	6 4700 Silver Hill Road	6 Suitland	MD	207470000	F6	80	20		2	1
8	010000001	Drake7	7 4700 Silver Hill Road	7 Suitland	MD	207470000	G7	60	10		1	1

Let's call the spreadsheet "template.xls". To account for the *CFN*, we need to insert<sup>15</sup> a Column into the spreadsheet. After the column is inserted, give the inserted column a name (like *CFN*). We now have:

template												
	A	B	C	D	E	F	G	H	I	J	K	L
1	CFN	EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees	March
2		010000001	Drake1	1 4700 Silver Hill Road	1 Suitland	MD	207470000	A1	400	100		15
3		010000001	Drake2	2 4700 Silver Hill Road	2 Suitland	MD	207470000	B2	800	200		5
4		010000001	Drake3	3 4700 Silver Hill Road	3 Suitland	MD	207470000	C3	0	0		0
5		010000001	Drake4	4 4700 Silver Hill Road	4 Suitland	MD	207470000	D4	240	60		9
6		010000001	Drake5	5 4700 Silver Hill Road	5 Suitland	MD	207470000	E5	400	400		12
7		010000001	Drake6	6 4700 Silver Hill Road	6 Suitland	MD	207470000	F6	80	20		2
8		010000001	Drake7	7 4700 Silver Hill Road	7 Suitland	MD	207470000	G7	60	10		1

Save the altered spreadsheet, and name it template.xls.

## E. Creating the Custom Census File Number Map

Create a map in order to tell *Surveyor* which columns in your spreadsheet go with which fields on the Form. In the following example we create a map for the NC-99002 Form.

1. Go to **Start | Programs | U.S. Census Bureau | Surveyor**. Close the Welcome Screen.
2. From the Form Inbox, select **Tools | Create Import/Export Map**.
3. Select **Next**.

4. Highlight the one particular Form Number<sup>16</sup> that corresponds to your spreadsheet, and click **Next**.

Title	Form Number
2005 Report of Organization	NC-99002
2005 Report of Organization	NC-99003
2005 Annual Survey of Manufactures	MA-10000

17

5. On the following screen, enter the file name of the spreadsheet (such as template.xls). Click on the folder button to browse your desktop.

<sup>15</sup> In Excel, highlight Column (A) by left clicking on the column header, and then right click with your mouse in order to select *insert* from the options list.

<sup>16</sup> Form numbers are NC-99002, MA-10000, etc.

<sup>17</sup> The choice of Forms is dependent on the Surveys you are completing. You may have all of the above or some subset of the above.

### Select a Spreadsheet for Mapping

Please specify an existing example spreadsheet to use in designing your map. This should be the spreadsheet from which you will import your data, or a similar one.

Click **Next** to continue.

Excel Spreadsheet or comma delimited text (CSV) as guide

After you select the spreadsheet, select **Next**.

6. If you are picking up where you left off on a previously saved map, specify its name or click the folder button to browse for the map file.

### Click Finish to Create a New Map

If you have already begun work and would like to edit that map, you may select it now.

Click **Finish** to continue.

Existing Surveyor Import Map File (Optional)

7. If you are starting from scratch, just press **Finish**, and you will enter the mapping procedure.<sup>18</sup>
8. Assuming you are starting from scratch and using the spreadsheet from the beginning of Part D (template.xls), when the mapping software opens, (minus the

---

<sup>18</sup> If you have multiple spreadsheets with similar formats to import, you can create one map, and use the above screen to make alterations to the map rather than having to start from scratch each time. See the **Note** at the end of the mapping procedure.



yellow comments) you will see:

U.S. DEPARTMENT OF COMMERCE | 2005 REPORT OF ORGANIZATION

FORM NC-99002

We have listed establishments of your company based on Census records. Please update as follows:

- Part (a) - Company Establishments and Subsidiaries** - Add store or plant number. Correct any errors or omissions in the information. The establishments are listed in the sequence: Employer Identification Number (EIN), major activity, and geographic location.
- Column (b)** - Report the number of employees and payroll for full- and part-time employees working at this establishment whose payroll was reported on your Internal Revenue Form 941, Employer's Quarterly Federal Tax Return, and/or any full- and part-time employee payroll was filed under a Professional Employer Organization's EIN. Include part-year data. Do not combine data for establishments. If book figures are not available for employee payroll for each establishment, please provide your best **estimates**.
- Column (c)** - Report status of each establishment at the end of 2005.

Company Establishments and Subsidiaries (Add store or plant number, if any, and correct any errors or omissions.)	2005 Employment and Payroll	Operational Status at the end of 2005
010000001 Drake1	100	15

CFN	EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees March	Operational Status	Date
010000001	010000001	Drake1	14700 Silv1	Suitland	MD	207470000	A1	400	100	15	1	

9. In the upper left, enter a *Description* or name that will be meaningful to you.

10. Under *Mapping Type* select *Standard*.

11. Go to the *Import Index Tab*,<sup>19</sup> and the view will be altered:

Import Mapping [NC-99002]

File View Help

Open Sample Spreadsheet... New Mapping File Open Mapping File... Save Map File First Page Previous Page Next Page

Last Page Close Map System

< Prior Field Next Field >

General

Import Index Field

RECORD\_CFN

Link

Unlink

Column to use as index for each form

Link Index To Column

Unlink Index From Column

Import Index

Data Linking

Name

First quarter payroll (Jan. - Mar.)

Name of new owner or operator

Store or plant No.

Physical location (Number and street)

City, town, village, etc.

Annual payroll

Report in Thousands

State

ZIP Code

City, town, village, etc.

State

ZIP Code

CFN

C:\Documents and Settings\herne304\Desktop\User Guide\template.xls

CFN	EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees March	Operational Status	Date
010000001	Drake1	1 4700 Silv	Suitland	MD	207470000	A1	400	100	15	1		

The Import Index Screen above is used to set the Import Index.<sup>20</sup>

- Select RECORD\_CFN from the Import Index Field

Import Index Field

RECORD\_CFN

- Select the data cell<sup>22</sup> on the electronic form that you wish to transfer the spreadsheet data to. Point your mouse to the data cell you would like to select, and left click. We are *Linking*<sup>23</sup> the *Census File Number* as our Index, so that is what we select for the data cell. Once a data cell is selected, it will have a pink highlight.<sup>24</sup>

<sup>19</sup> There are 3 Tabs running down the left side of the Map Wizard (*General*, *Import Index*, and *Data Linking*). Each Tab adjusts the view.

<sup>20</sup> The Import Index is a unique alpha, numeric, or alphanumeric characteristic for each location. It is used to match the individual locations in *Surveyor* and the spreadsheet during the transfer of data. During Export each location with an Import Index will be produced in the spreadsheet that is created, and during import, *Surveyor's* Import Index is matched to the Spreadsheet's Import Index in order to correctly communicate the transfer of data.

<sup>21</sup> RECORD\_STORENUM can also be used as an Import Index, but in the interest of clarity we will use the *Census File Number*, for the *Census File Number* is for the RECORD\_CFN and should be connected to CFN.

<sup>22</sup> A data cell is the location on the electronic Form that we enter/input the data to. In the picture above *State*, *ZIP Code*, and *Store or plant No* are all data cells.

<sup>23</sup> Linking is the connection of a spreadsheet column to a specific data cell.

<sup>24</sup> If you are looking at a black and white print of this mapping explanation, the pink highlight does not appear. Look at *Surveyor*.

- The *CFN* data cell should be *linked* with the spreadsheet's *CFN* column.
- The data cell with the pink highlight is the location on the Form we will be *Linking* to.
- Our spreadsheet runs across the bottom of the screen. If a spreadsheet column is highlighted in blue, that is the column we have selected to *Link* the pink data cell to.
- In the picture above the spreadsheet's *CFN* column is highlighted.
- Once we have everything lined up (we have selected RECORD\_CFN as our Index, we have selected the *CFN* as the data cell from the Form, and we have the column for the *Census File Number* highlighted in the spreadsheet), push *Link*:

- We have set the Index. It is in the 1st Column of our template.xls spreadsheet. It will be called *Import Index Field*. We have:

Import_Index_Field	EIN NumbrName	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees March	Operat
CFN	010000001 Drake1	1 4700 Silv	1 Suitland	MD	207470000	A1	400	100	15	1
	010000001 Drake2	2 4700 Silv	2 Suitland	MD	207470000	B2	800	200	5	1
	010000001 Drake3	3 4700 Silv	3 Suitland	MD	207470000	C3	0	0	0	4
	010000001 Drake4	4 4700 Silv	4 Suitland	MD	207470000	D4	240	60	9	1

- Save the spreadsheet with a meaningful name.

12. We have *Linked* the Import Index, so we just need to *Link* the appropriate remaining spreadsheet columns to the data cells. Select the *Data Linking Tab*,



and you will have:

Import Mapping [NC-99002]

File View Help

Open Sample Spreadsheet... New Mapping File Open Mapping File... Save Map File First Page Previous Page Next Page

Last Page Close Map System

< Prior Field Next Field >

Link Field To Column Unlink Field/Column

General Import Index Data Linking

EIN 2005

NAICS

Major activity

Name

Secondary name

Store or plant No.

Physical location (Number and street)

Annual payroll

Report in Thousands

City, town, village, etc.

State ZIP Code

Other - Specify

MMDDYYYY

First quarter payroll (Jan - Mar.)

Report in Thousands

Name of new owner or operator

Mailing address (Number street, P.O. box, etc.)

C:\Documents and Settings\henne304\Desktop\User Guide\template.xls

Import_Index_Field	EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees March	Operational
CFN	010000001	Drake1	1 4700 Silv1	Suitland	MD	207470000	A1	400	100	15	1
	010000001	Drake2	2 4700 Silv2	Suitland	MD	207470000	B2	800	200	5	1

- Select the spreadsheet column associated with *Annual payroll*, and that column will have a blue highlight.
- Once the correct location on the form is designated (in this case *Annual payroll*),<sup>25</sup> that data cell will have a pink highlight. Press

Link Field To Column

- The spreadsheet at the bottom of the screen will update the *Linking* as follows:

C:\Documents and Settings\henne304\Desktop\User Guide\template.xls

Import_Index_Field	EIN Number	Name	Street	City	State	Zip	Store #	PAY_ANN_TOT	1st Quarter	Employees March	Operational
CFN	010000001	Drake1	1 4700 Silv1	Suitland	MD	207470000	A1	400	100	15	1
	010000001	Drake2	2 4700 Silv2	Suitland	MD	207470000	B2	800	200	5	1

13. Repeat step 12 for all the columns in your spreadsheet that coincide with the data elements on the Form.

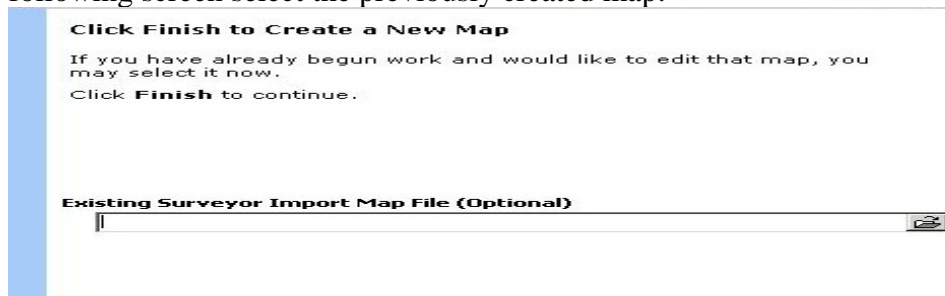
14. Save your data. If you installed *Surveyor* on the default drive, save the Map to

<sup>25</sup> Designate the Form location by clicking on the data cell where spreadsheet information should be input.

**C: /Program Files | Census | Surveyor | Forms | maps**, and the next time you enter the import / export procedure you can select the map from the map pull-down list.<sup>26</sup>

15. Once the mapping is complete, export the Form Inbox using the new map in order to get the *CFNs* into a format you can use, or if you already have your organization's locations associated with our *CFNs*, use the map to import your data.

**Note:** In the process of creating the map or gathering data for your spreadsheet, you find that you omitted a column, add any additional columns in the next empty column of the spreadsheet already mapped. The following procedure can be used to create a map for NC-99003 if you already created a map for NC-99002, for the two forms have many common data cells. Enter the Mapping Wizard, select the new spreadsheet, and on the following screen select the previously created map.



Press **Finish**. You modified your spreadsheet, so new columns are to the right of the columns previously mapped. As a result, you will only need to specify data *Linking* for newly inserted columns. The mapping is based on column sequence and not on any of the headings that are used.<sup>27</sup>

## 4.4 Importing/Exporting With The *Store/Plant* Number:

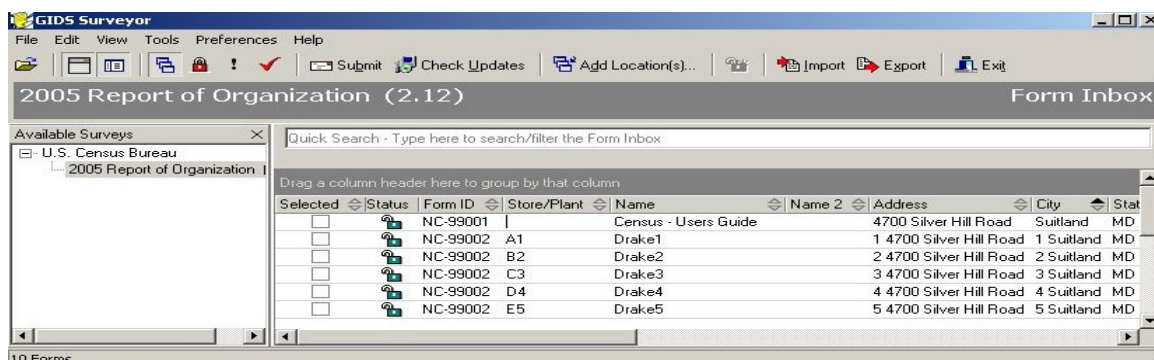
### A. Verify the Form Inbox

Make sure that the Form Inbox includes every one of your locations. Each location should contain a unique *Store/Plant*<sup>28</sup> number. That *Store/Plant* number can be used to match with information in your company records. The Form Inbox should include a line for each of your locations.

<sup>26</sup> If Surveyor is not on the default installation location (**C:/Program Files/Census/Surveyor**), just save the map to you desktop, and when you enter the import/export procedure, you can browse from the map pull down list.

<sup>27</sup> It is a good idea to save the new map with a new name.

<sup>28</sup> The *Store/Plant* number will be our Import Index.



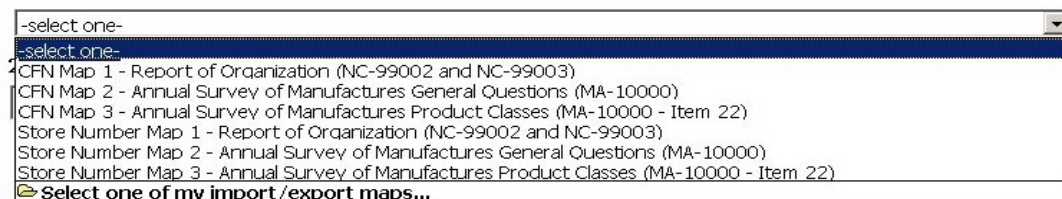
If the *Store/Plant* identifier for any store in the list is blank or incorrect, click on the blank or incorrect *Store/Plant* number, and update it in the Form Inbox. Each *Store/Plant* identifier must be unique. You may use any alphabetic or numeric character, but it is not recommended that *Store/Plant* numbers start with leading zeros (i.e. do not do 002, 03, etc).<sup>29</sup> If there are currently no *Store/Plant* numbers, you **must** add them in order to export/import data, or you may wish to use the default *Census File Number* map. **Locations without unique identifiers will not export or import correctly.**<sup>30</sup>

## B. Export the List of Establishments (optional, but recommended)<sup>31</sup>

You can correct address and other information once the data is in your spreadsheet, except that the *Store/Plant* number must be edited within *Surveyor* prior to export, with the Store Number Map. The *Store/Plant* number guides the exporting/importing process. Exporting will load the list of establishments with its pre-listed data, as well as any other data you may have previously entered, into a spreadsheet. The process requires a map.

1. There are default maps within Surveyor. Some default maps use the *Store/Plant* number as the Import Index and others use the Census File Number. (See Section 4.3) Select **Tools | Export**, and then select **Next**. Pick a Default Map from the pull down list.

1. Select your import/export map to use



32

<sup>29</sup> If your *Store/Plant* numbers already start with zero, see Surveyor's Help file for Leading Zeros.

<sup>30</sup> Exception: Forms NC-99001, NC-99530, and MA-10001 cannot be exported or imported.

<sup>31</sup> This procedure will export a spreadsheet into our default format.

<sup>32</sup> If you are only completing the Report of Organization, you will only have the Report of Organization Maps.

Similarly, if you only have the Annual Survey of Manufactures complete, you will only have the Annual Survey of Manufactures default maps. Use one of the Annual Survey of Manufactures Product Classes Maps to complete Item 22, and use of the Annual Survey of Manufactures General Questions Maps for all other question.

- Once the correct map is selected, the spreadsheet you wish to export to must be designated.

1. Select your import/export map to use

Store Number Map 1 - Report of Organization (NC-99002 and NC-99003)

2. Comma delimited (CSV) file name to save your exported data

☒ Include Headings in Export File

The folder under **2. Comma delimited...** allows a user to browse in order to designate a location where the spreadsheet will be created. Just click the folder all the way on the right. Once the location is selected, give the file a name.<sup>33</sup>

- Select **Next**, and you will have to designate which forms are to be exported.<sup>34</sup> The following will appear.

- Export All Forms** can be used if the Form Inbox exclusively has the Report of Organization or exclusively has the Annual Survey of Manufactures.

☒ Export All Forms

☐ Export All Forms of Type:

☐ Export Selected Forms

Selected	Status	Form ID	Store/Plant	Name	Name 2	Address
<input checked="" type="checkbox"/>		NC-99001		Census - Users Guide		4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	A1	Drake1		1 4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	B2	Drake2		2 4700 Silver Hill Road
<input type="checkbox"/>		NC-99003	C3	Drake3		3 4700 Silver Hill Road

Do not attempt to Export all locations if you are completing more than one Survey.<sup>35</sup>

- Export All Forms of Type** allows the user to select a Form Number<sup>36</sup> for export. This selection is good to use when there are multiple Form Numbers within the Form Inbox, and you wish to export all the locations associated with a specific Form Number.

☐ Export All Forms

☒ Export All Forms of Type:

☐ Export Selected Forms

NC-99001 2005 Report of Organization

NC-99002 2005 Report of Organization

NC-99003 2005 Report of Organization

Selected	Status	Form	Address
<input checked="" type="checkbox"/>		NC-99001	Census - Users Guide
<input type="checkbox"/>		NC-99002	Drake1
<input type="checkbox"/>		NC-99002	Drake2
<input type="checkbox"/>		NC-99002	Drake3

The Form Number must coincide with the Map that was selected.<sup>37</sup> Use **Export Selected Forms** to isolate specific locations of common Form Number in order to export a parsed spreadsheet, or you may export individual locations.

<sup>33</sup> Surveyor only exports .csv, but Surveyor can import .xls or .csv.

<sup>34</sup> The Forms need to match the map. If the map is The Report of Organization, the appropriate Forms are NC-99002 and NC-99003. The appropriate Form for The Annual Survey of Manufactures export/import is MA-10000.

<sup>35</sup> If you export all forms, NC-99001 will not export, and if you export all forms, NC-99530 will not export. The following Forms (NC-99001, NC-99530, and MA-10001) cannot be import or exported.

<sup>36</sup> Form numbers are NC-99002, MA-10000, etc.

<sup>37</sup> The Form Number selection is limited to Form Numbers within the Form Inbox.

☐ Export All Forms  
☐ Export All Forms of Type:    
☒ Export Selected Forms

Selected	Status	Form ID	Store/Plant	Name	Name 2	Address
<input type="checkbox"/>		NC-99001		Census - Users Guide		4700 Silver Hill Road
<input checked="" type="checkbox"/>		NC-99002	A1	Drake1		1 4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	B2	Drake2		2 4700 Silver Hill Road
<input checked="" type="checkbox"/>		NC-99002	C3	Drake3		3 4700 Silver Hill Road
<input type="checkbox"/>		NC-99002	D4	Drake4		4 4700 Silver Hill Road

In the above screenshot, *Store/Plant* A1 and D4 will export. Only locations with the same Form Number can be successfully exported/imported together.<sup>38</sup> Click on a Column header (Name, Store/Plant, Address, etc), and Surveyor will sort the locations by that Column.

- Once the locations have been selected for Export, click **Next | Finish**. After the progress bar fills, select **Close**. The data will be exported from Surveyor into a “.csv” file. Enter Excel, and open the .csv file.<sup>39</sup>
- If steps A and B above have been followed, you will just need to answer the questions that apply to your organization.
- If steps A and B have been followed, input data into the spreadsheet columns that apply to your organization and import.
- Skip to Section 4.6 if you are using Census default maps to import.

**Note: The Surveyor software will not export leading zeros. Please see Section 4.7 to see how to format leading zeros in your spreadsheet.**

### C. Creating the Custom *Store/Plant* number Map<sup>40</sup>

If you already have your data in a spreadsheet, and the *Store/Plant* numbers in your spreadsheet match the *Store/Plant* numbers in *Surveyor*, you can import the data directly into *Surveyor* with a custom map.<sup>41</sup> Suppose the following is our spreadsheet. We have named it “template.xls”.

template.xls												
	A	B	C	D	E	F	G	H	I	J	K	L
1	EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees	Marci	Operation Date
2	010000001	Drake1	1 4700 Silver Hill Road	1 Suitland	MD	207470000	A1	400	100	15	1	
3	010000001	Drake2	2 4700 Silver Hill Road	2 Suitland	MD	207470000	B2	800	200	5	1	
4	010000001	Drake3	3 4700 Silver Hill Road	3 Suitland	MD	207470000	C3	0	0	0	4	01232003
5	010000001	Drake4	4 4700 Silver Hill Road	4 Suitland	MD	207470000	D4	240	60	9	1	
6	010000001	Drake5	5 4700 Silver Hill Road	5 Suitland	MD	207470000	E5	400	400	12	1	
7	010000001	Drake6	6 4700 Silver Hill Road	6 Suitland	MD	207470000	F6	80	20	2	1	
8	010000001	Drake7	7 4700 Silver Hill Road	7 Suitland	MD	207470000	G7	60	10	1	1	
9	010000001	Drake8	8 4700 Silver Hill Road	8 Suitland	MD	207470000	H8	70	5	1	1	

An Import map must be created in order to tell *Surveyor* which columns in the spreadsheet go with which fields on the Form. In the following example we create a map for the NC-99002 Form.

<sup>38</sup> An exception, NC-99002 and NC-99003 can be imported / exported together with either of the Report of Organization default map.

<sup>39</sup> Once the .csv is opened it can be saved as .xls in order to maintain any formatting you may institute.

<sup>40</sup> If you adjusted the order of your data's columns so that it matches our default column locations, you could import using the default map already stored in Surveyor, but you would still need the unique *Store/Plant* numbers or appropriate Census File Numbers.

<sup>41</sup> There are still formatting rules that will need to be accounted for (i.e. report in thousands of dollars, 1=in operation). Consult the Business Help Site for formatting rules. See Footnote 1.



1. Go to **Start | Programs | U.S. Census Bureau | Surveyor**. Close the Welcome Screen.
2. From the Form Inbox, select **Tools | Create Import/Export Map**.
3. Select **Next**.

4. Highlight the one particular Form Number<sup>42</sup> that corresponds to your spreadsheet, and click **Next**.

Title	Form Number
2005 Report of Organization	NC-99002
2005 Report of Organization	NC-99003
2005 Annual Survey of Manufactures	MA-10000

43

5. On the following screen, enter the file name of your spreadsheet (such as our template.xls). Click on the folder button to browse your desktop.

**Select a Spreadsheet for Mapping**

Please specify an existing example spreadsheet to use in designing your map. This should be the spreadsheet from which you will import your data, or a similar one.

Click **Next** to continue.

**Excel Spreadsheet or comma delimited text (CSV) as guide**

After you select your spreadsheet, select **Next**.

6. If you are picking up where you left off on a previously saved map, specify its name.

**Click Finish to Create a New Map**

If you have already begun work and would like to edit that map, you may select it now.

Click **Finish** to continue.

**Existing Surveyor Import Map File (Optional)**

7. If you are starting from scratch, just press **Finish**, and you will enter the mapping procedure.<sup>44</sup>
8. Assuming you are starting from scratch, using the spreadsheet from the beginning of Part C (template.xls), and mapping Form NC-99002 when the

<sup>42</sup> Form numbers are NC-99002, MA-10000, etc.

<sup>43</sup> The choice of form is dependent on the Survey you are completing. You may have all of the above forms or some subset of the above.

<sup>44</sup> If you have multiple spreadsheets with similar formats to import, you can create one map, and use the above screen to make alterations to the map rather than having to start from scratch each time. See the **Note** at the end of the mapping procedure.

mapping software opens, (minus the yellow comments below) you will see:

There are 3 Tabs running down the side of the Mapping Wizard (General, Import Index, and Data Linking). Each Tab alters the Display. We are currently on the General Tab.

Enter a meaningful name for the Description [for example: change <New Map> to <NC-99002>].

There are 2 Mapping Types [Standard and Sequence]. Standard is simpler, and it will be used in the example.

The spreadsheet you are building the map for will be displayed across the bottom.

EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees	Operational S	Date Char
0100000001	Drake1	1 4700 Silv1	Suitland	MD	207470000A1	400	100	15	1		

9. In the upper left, enter a *Description* or name that will be meaningful to you.

10. Under *Mapping Type* select *Standard*.

11. Go to the *Import Index Tab*,<sup>45</sup> and the view will be altered

There are 3 Tabs running down the side of the Mapping Wizard (General, Import Index, and Data Linking). Each Tab alters the Display. We are currently on the Import Index Tab.

The Import Index is a unique identifier that enables communications between Surveyor and a spreadsheet. The Import Index drop down box has 2 choices for Index. You may use Store Number or Census File Number. We are using Store Number (RECORD\_STORENUM) in this example, so select RECORD\_STORENUM.

The spreadsheet column we are linking (Store #) has a blue highlight. The data cell on the form (NC-99002) we are linking to the spreadsheet column has a pink highlight.

The specific data cell we are linking has a pink highlight. Store or plant No. is the data cell for Store Number (RECORD\_STORENUM).

EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees	Operational	S	Date Char
010000001	Drake1	1 4700 Silv	1 Suitland	MD	207470000	A1	400	100	15	1		

The Import Index Screen above is used to set the Import Index.<sup>46</sup>

- Select RECORD\_STORENUM from the Import Index Field

- Select the data cell<sup>48</sup> on the electronic Form that you wish to transfer the spreadsheet data to. Point your mouse to the data cell you would like to select, and left click. We are *Linking*<sup>49</sup> the *Store/Plant* number as our Import Index, so that is what we select for the data cell. Once a data cell is selected, it will have a pink highlight.<sup>50</sup>

<sup>45</sup> There are 3 Tabs running down left the side of the Map Wizard (*General*, *Import Index*, and *Data Linking*). Each Tab adjusts the view.

<sup>46</sup> The Import Index is a unique alpha, numeric, or alphanumeric characteristic for each location. It is used to match the individual locations in *Surveyor* and the spreadsheet during the transfer of data. Locations may be exported without a unique index, but during import, Surveyor's Import Index is matched to the spreadsheet's Import Index in order to correctly communicate the transfer of data, so locations will not import correctly without a unique index.

<sup>47</sup> RECORD\_CFN can also be used as an Import Index, but in the interest of clarity we will use the *Store/Plant* number, for the *Store/Plant* number is for the RECORD\_STORENUM and should be connected to *Store or plant No.*

<sup>48</sup> A data cell is the location on the electronic Form that we enter/input the data to. In the picture above *NAICS*, *Major Activity*, and *Name* are all data cells.

<sup>49</sup> Linking is the connection of a spreadsheet column to a specific data cell.

<sup>50</sup> If you are looking at a black and white print of this mapping explanation, the pink highlight does not appear. Look at Surveyor.



- *Store or plant No.* data cell should be linked with the spreadsheet's *Store/Plant* number column.
- The data cell with the pink highlight is the location on the Form we will be *Linking* to.
- Our spreadsheet runs across the bottom of the screen. If a spreadsheet column is highlighted in blue that is the column we have selected to *Link* the pink data cell to.
- In the picture above the spreadsheet's *Store/Plant* number column is highlighted.
- Once we have everything lined up (we have selected RECORD\_STORENUM as the Index, we have selected the *Store or plant No.* as the data cell from the Form, and we have the column with our *Store/Plant* number highlighted in the spreadsheet), click *Link*:



- We have set the Index. It is in the 7<sup>th</sup> Column of our template.xls spreadsheet. It will be called "Import\_Index\_Field". We now have:

C:\Documents and Settings\henne304\Desktop\User Guide\template.xls

						Import_Index_Field				
EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees	Operational
010000001	Drake1	1 4700 Silv	1 Suitland	MD	207470000	A1	400	100	15	1
010000001	Drake2	2 4700 Silv	2 Suitland	MD	207470000	B2	800	200	5	1
010000001	Drake3	3 4700 Silv	3 Suitland	MD	207470000	C3	0	0	0	4

- Save the spreadsheet with a meaningful name.

12. We have *Linked* the Import Index, so we just need to *Link* the appropriate remaining spreadsheet columns to the data cells. Select the *Data Linking Tab*,

and you will have:

Import Mapping [NC-99002]

File View Help

Open Sample Spreadsheet... New Mapping File Open Mapping File... Save Map File First Page Previous Page Next Page

Last Page Close Map System

< Prior Field Next Field >

General Import Index Data Linking

Link Field To Column Unlink Field/Column

NC-99002

5 A. PRE-IDENTIFIED LOCATIONS OF OPERATIONS

We have listed establishments of your company based on Census records. Please update as follows:

- Part (a) - Company Establishments and Subsidiaries** - Add store or plant number. Correct any errors or omissions in the information. The establishments are listed in the sequence: Employer Identification Number (EIN), major activity, and geographic location.
- Column (b)** - Report the number of employees and payroll for full- and part-time employees working at this establishment whose payroll was reported on your Internal Revenue Form 941, Employer's Quarterly Federal Tax Return, and/or any full- and part-time employee payroll was filed under a Professional Employer Organization's EIN. Include part-year data. Do not combine data for establishments. If book figures are not available for employee payroll for each establishment, please provide your best **estimates**.
- Column (c)** - Report status of each establishment at the end of 2005.

Company Establishments and Subsidiaries (Add store or plant number, EIN, and Operational Status at the end of 2005)

(a) (b) (c)

EIN 2005

Other Specify

The Column in the spreadsheet you are linking to the pink data cell will have a blue highlight.

EIN Number	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees	Operational
010000001	Drake1	1 4700 Silv1	Suitland	MD	207470000	A1	400	100	15	1
010000001	Drake2	2 4700 Silv2	Suitland	MD	207470000	B2	800	200	5	1
010000001	Drake3	3 4700 Silv3	Suitland	MD	207470000	C3	0	0	0	4
010000001	Drake4	4 4700 Silv4	Suitland	MD	207470000	D4	240	50	0	1

- Select the spreadsheet column associated with the EIN number, and that column will have a blue highlight.
- Once the correct location on the form is designated (in this case EIN),<sup>51</sup> that data cell will have a pink highlight. Press **Link Field To Column**.
- The spreadsheet at the bottom of the screen will update the *Linking* as follows.

EIN_NUM	Name	Street	City	State	Zip	Store #	Total Payroll	1st Quarter	Employees	Operational
010000001	Drake1	1 4700 Silv1	Suitland	MD	207470000	A1	400	100	15	1
010000001	Drake2	2 4700 Silv2	Suitland	MD	207470000	B2	800	200	5	1
010000001	Drake3	3 4700 Silv3	Suitland	MD	207470000	C3	0	0	0	4
010000001	Drake4	4 4700 Silv4	Suitland	MD	207470000	D4	240	50	0	1

13. Repeat step 11 for all the columns in your spreadsheet that coincide with the data elements on the Form.

14. Save your map file. If you installed *Surveyor* on the default drive, save the Map to **C:\Program Files\Census\Surveyor\Forms\maps**, and the next time you enter the import / export procedure you can select the map from the map pull down list.<sup>52</sup>

<sup>51</sup> Designate the Form location by clicking on the data cell where spreadsheet information should be input.

<sup>52</sup> If Surveyor is not on the default installation location (**C:\Program Files\Census\Surveyor**), just save the map to your desktop, and when you enter the import/export procedure, you can browse from the map pull down list.

Once the mapping is complete, and the spreadsheet that coincides with the map contains data, you are ready to import. (See 4.6 for importing instructions)

#### 4.5 Importing Product Class Codes (MA-10000's Item 22)<sup>53</sup>

A custom map cannot be built in order to import/export Item 22, for MA-10000's Item 22 uses a sequence system in order to import/export data. If you use the default map (*Store Number Map 3*) – *Annual Survey of Manufactures Product Classes (MA-10000 – Item 22)*, make sure each MA-10000 has a unique Store Number in the Form Inbox. If you use the default map (*CFN Map 3*) – *Annual Survey of Manufactures Product Classes (MA-10000 – Item 22)*, all of the locations will have unique indexes, so you will not need to worry about creating unique indexes. After an export or in order to import, the spreadsheet's first column (Column A) has the Import Index, and that column needs to be unique for each location. However, the Import Index will repeat itself once for each product associated with a given location. The second column (Column B) has the sequence number.<sup>54</sup> The following example uses the store number as the Index.

template.xls						
	A	B	C	D	E	F
1	RECORD STORENUM	<#>	PROD. CLASS. DESC	PROD. CLASS. DESC	PROD. CLASS. CODE	PROD. CLASS. VAL
2	%INDEX%	%SEQUENCE%	Product Class Description	Product Class Description	Product Class Code	Product Class Value
3	2	1	Ready-mix concrete		3273200	
4	2	2	Contract work - Receipts for work done for others o		9300000	
5	2	3	Resales - Sales of products bought and sold withou		9998900	
6	2	4	Miscellaneous receipts (including receipts for repai		9998000	
7	2	5	TOTAL		7700000	
8	8	1	Concrete block and brick		3273310	
9	8	2	Contract work - Receipts for work done for others o		9300000	
10	8	3	Resales - Sales of products bought and sold withou		9998900	
11	8	4	Miscellaneous receipts (including receipts for repai		9998000	
12	8	5	TOTAL		7700000	

Number 2 is the first location's Import Index. There are 4 products and a Total associated with that location. The number 8 is the next Import Index. Every time that the last product for a location is reached, the next row will have a new unique Import Index in Column A, and Column B will have a 1 for the first product associated with that Import Index.

New products must be added to the electronic Form prior to export if you wish to import data for that new product. From the Form Inbox, enter a specific location, and go to Item 22. When Item 22 is opened, we have:


Once the **Add** button is pressed, space for a new product will appear, but no information

<sup>53</sup> Surveyor's default Annual Survey of Manufactures maps for Item 22 are the Product Class maps. There is one that uses the *Store/Plant* number as the Import Index and another that uses the *Census File Number* as the Import Index.

<sup>54</sup> The sequence number is a numerically increasing field coinciding with the order of products listed in Item 22 (i.e. 1 is for the first product associated with the Import Index in Column A, 2 is for the second product associated with the Import Index in Column A, etc).

<sup>55</sup> Column A is the Import Index, Column B is the Sequence Number, Column C is the Product Class Description, Column D is for writing in a Product Class Description (only for code 0000001: Other), Column E is the Product Code, Column F is for dollar amounts (reported in thousands), and Column G is for prior year data (reported in thousands).

will be associated with that added product:

If you click on the binoculars icon , you will be given a list of product classes.

At that point, scroll through the codes, type a Product Code into the **Find** box, or type a product (such as *Dog Food*, *Corn Oil*, or *Brooms*) in to the **Find** box, and press **Search**.<sup>56</sup> Then, all the product codes associated with the search criteria will appear in the **Matches** area. Once you find the product you would like to add to the Form, double click on the product, or highlight the product, and press **OK** in order to transfer the product to your individual MA-10000 Form.

Save your changes. Now, if you export the products, the added product (*Brooms, mops, and dusters*) will appear in the spreadsheet.

See Section 6.3 (Item 22) for more information on product codes.

See Section 4.6 for general information about different types of importing.

## 4.6 Importing Data into Surveyor

Go to **Tools | Import**, and you are taken to the Import Wizard.

<sup>56</sup> Do not type in the description, and simply press enter on your keyboard, or you will be taken back to the Form.

**Welcome to Surveyor Importing**  
**Select Files For Import**  
 After selecting, click **Next** to continue.

**1. Specify the Excel Spreadsheet or comma delimited text (CSV) for Import**


**2. Select your custom import/export map to use ?**

In **Part 1. Select your import/export map....**, you have the following choices:

**1. Select your import/export map to use**

-select one-

- select one-
- CFN Map 1 - Report of Organization (NC-99002 and NC-99003)
- CFN Map 2 - Annual Survey of Manufactures General Questions (MA-10000)
- CFN Map 3 - Annual Survey of Manufactures Product Classes (MA-10000 - Item 22)
- Store Number Map 1 - Report of Organization (NC-99002 and NC-99003)
- Store Number Map 2 - Annual Survey of Manufactures General Questions (MA-10000)
- Store Number Map 3 - Annual Survey of Manufactures Product Classes (MA-10000 - Item 22)

 **Select one of my import/export maps...**

Be sure to select the map that applies to the spreadsheet you intend to import.<sup>57</sup> All of the above default maps may not appear as a selection option under your **1. Select your import/export map to use...**<sup>58</sup> Use the **Select one of my import/export maps** in order to browse and locate any custom maps you may have built.<sup>59</sup>

Once the map is selected, specify a spreadsheet to import in part 2. **Specify the Excel Spreadsheet...**, select the spreadsheet you would like to import.

Once the appropriate spreadsheet and map are selected, Surveyor will look to see if the spreadsheet and Surveyor Import Indexes match. Any spreadsheet locations that do not have a matching index in Surveyor will appear at the bottom of the screen.

<sup>57</sup> NC-99002 and NC-99003 can only be imported together using a Census supplied Report of Organization map.

<sup>58</sup> The maps pre-listed in Surveyor are dependent on the Survey(s) you are completing.

<sup>59</sup> If the custom map was saved as suggested in II.C.#14 and III.C.#13, when the map selection is opened, the custom map(s) saved to **C:/Program Files | Census | Surveyor | Forms | maps** will be offered as an option [in the map pull down](#).



**1. Select your import/export map to use** ?

CFN Map 1 - Report of Organization (NC-99002 and NC-99003)

**2. Specify the Excel Spreadsheet or comma delimited text (CSV) for Import**

"C:\Documents and Settings\henne304\Desktop\Report Organization CFN.csv"

**Establishments You Are Adding**  
(Note: Right Click in the table below to set all Form ID's at once.)

Establishment Number	Form Id
1	<do not add>
2	<do not add>
3	<do not add>
4	<do not add>

The Establishment Number is the Import Index. If the *Store Number* was used as the Import Index, the values in the *Establishment Number* list are the specific instances where *Store Numbers* from the spreadsheet are not matched with a location in Surveyor. The spreadsheet locations represented in the *Establishment Number* list can be added as new locations (NC-99003). In order to Add a location click on the drop down, and select NC-99003. If you right click, you can set all to first available form. Only NC-99002 and NC-99003 should be imported together, and you must use a default map in order to import NC-99002 and NC-99003 together. You may be given the option to add NC-99003 when you are importing the MA-10000 forms, but please do not add NC-99003 at that time. Before adding any NC-99003, you should determine if these locations are really new locations, or is there some inconsistency between the Import Index in the spreadsheet and the Surveyor? Select **Next**, and Surveyor will confirm that you are ready to Import. Select **Next**, and Surveyor will import the data.

### Review Your Work:

Review the data in *Surveyor* for selected locations to confirm that the correct data was imported into the specified location. Open a form and go to **File | Print** to review Forms in hard copy, or put a check in the “Selected” field in the Form Inbox, and go to **File | Print Selected Forms....** After an import, the Error and Warnings Columns in the Form Inbox will be updated. These are not the same Warnings and Errors that are experienced during import, for the Form Inbox Warnings and Errors look for inconsistencies<sup>60</sup> in data that was input incorrectly. Within the Form Inbox, in order to isolate Errors, scroll over to the right, and sort by the Error’s Column by pressing on **Errors**. Forms with Errors will have a red “1”, Forms that have not been updated will read “unknown,” and forms without Errors will have a “0” in the Error’s Column.

## 4.7 Leading Zeros in Exported Data

When data is exported from the GIDS Surveyor into a spreadsheet, all data elements (Store/Plant Number, Zip-code, EIN, etc.) containing leading zeros will have the leading

<sup>60</sup> An example of a data inconsistency that would produce a Warning is a first quarter payroll that is greater than annual payroll.

zeros removed in the exported file. The spreadsheet must be formatted after the export procedure to account for the limitation.

#### An Example Using Excel to Account for Leading Zeros:

GIDS's default export procedure places the Store/Plant Number in Column B, so after exporting the data, highlight Column B. Select Format | Cells from the toolbar. A pop-up screen appears. Pick Custom from the Number tab. Each digit in GIDS's Store/Plant Number should be accounted for by one zero in the Custom Format. If a GIDS Store Number is 023, enter 000 in the type box.

The new spreadsheet must be saved with an Excel (.xls) extension, or the modified spreadsheet will not retain the formatting.

#### 4.8 Copy/Distribute Using Exported File

### **Parsing of locations exported in the spreadsheet**

The following spreadsheets are truncated in the interest of space.

The following procedure will work with most Surveys,<sup>61</sup> but the specific example uses the Report of Organization.<sup>62</sup> The Surveyor's export procedure produces a ".csv" file. We will call the exported file "Master.csv." Rows 1 and 2 of Master.csv contain column headers and should not be highlighted during sorting procedures. For additional information on permissible values and field requirements consult the U.S. Census Bureau's Business Help Site's Map Keys ([www.census.gov/econhelp](http://www.census.gov/econhelp)). Click on "Report of Organization" or "Annual Survey of Manufactures". Click on "Electronic Reporting" and scroll down to Additional Notes. Click on "importing".

### **Parsing Locations:**

Assume "Master.csv" has the following data:

Master.csv								
	C	D	E	F	G	H	I	J
1	EIN_NUM	RECORD_NAME1	RECORD_NAME2	ADDR_STREET	ADDR_CITY	ADDR_ST	ADDR_ZIP	EMP_MAR12_TOT
2	Employer Id	Label Name 1	Label Name 2	Street Address	City	State	ZIP Code	Total Employees for Marc
3	010000001	COOKER NAME6		6 4700 SILVER HILL ROAD	SUITLAND	MD	207470005	
4	010000001	COOKER NAME4		4 4700 SILVER HILL ROAD	SUITLAND	VA	207470003	
5	010000001	COOKER NAME5		5 4700 SILVER HILL ROAD	SUITLAND	VA	207470004	
6	010000001	COOKER NAME3		3 4700 SILVER HILL ROAD	SUITLAND	MD	207470002	
7	010000001	COOKER NAME2		2 4700 SILVER HILL ROAD	SUITLAND	CA	207470001	
8	010000001	COOKER NAME1		1 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	
9	010000001	COOKER NAME7		7 4700 SILVER HILL ROAD	SUITLAND	MD	207470006	

<sup>61</sup> The MA-10000's product classes' default spreadsheet can be parsed, but the only identifying characteristic exported is the CFN or Store Number. Another characteristic may need to be added. Export the General Questions spreadsheet, and **Copy | Paste** the store name or State onto the product list's spreadsheet.

<sup>62</sup> Exporting from the GIDS Surveyor produces the default spreadsheet.

In order to distribute the locations around the organization by State (ADDR\_ST), highlight all of the organization's data<sup>63</sup>, go to **Data | Sort**, and a popup screen will appear. In the first "Sort by" list select Column H (Column H=ADDR\_ST). "Ascending" should be selected as default. Push "OK." Our mock spreadsheet will now look like:

Master.csv								
	C	D	E	F	G	H	I	J
1	EIN_NUM	RECORD_NAME1	RECORD_NAME2	ADDR_STREET	ADDR_CITY	ADDR_ST	ADDR_ZIP	EMP_MAR12_TOT
2	Employer Id	Label Name 1	Label Name 2	Street Address	City	State	ZIP Code	Total Employees for March
3	010000001	COOKER NAME2		2 4700 SILVER HILL ROAD	SUITLAND	CA	207470001	
4	010000001	COOKER NAME6		6 4700 SILVER HILL ROAD	SUITLAND	MD	207470005	
5	010000001	COOKER NAME3		3 4700 SILVER HILL ROAD	SUITLAND	MD	207470002	
6	010000001	COOKER NAME1		1 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	
7	010000001	COOKER NAME7		7 4700 SILVER HILL ROAD	SUITLAND	MD	207470006	
8	010000001	COOKER NAME4		4 4700 SILVER HILL ROAD	SUITLAND	VA	207470003	
9	010000001	COOKER NAME5		5 4700 SILVER HILL ROAD	SUITLAND	VA	207470004	

You may sort by multiple columns to refine the differentiation of locations.<sup>64</sup>

Now, suppose I am in CA, and I want to distribute the other locations on my spreadsheet to MD and VA. One person in each state will receive all of the locations for that specific state.

- 1) Open a new spreadsheet, and **Copy** the first two rows from the original ("Master.csv") spreadsheet onto the new spreadsheet.<sup>65</sup>
- 2) **Copy** (from "Master.csv") all of the Maryland locations, and **Paste** them onto the new spreadsheet.
- 3) If new locations are known, add the new establishments with unique Store Numbers to the appropriate regional specific spreadsheet, for this may alleviate work later.

MARYLAND.csv									
	C	D	E	F	G	H	I	J	K
1	EIN_NUM	RECORD_NAME1	RECORD_NAME2	ADDR_STREET	ADDR_CITY	ADDR_ST	ADDR_ZIP	EMP_MAR12_TOT	PAY_
2	Employer Id	Label Name 1	Label Name 2	Street Address	City	State	ZIP Code	Total Employees	First C
3	010000001	COOKER NAME6		6 4700 SILVER HILL ROAD	SUITLAND	MD	207470005		
4	010000001	COOKER NAME3		3 4700 SILVER HILL ROAD	SUITLAND	MD	207470002		
5	010000001	COOKER NAME1		1 4700 SILVER HILL ROAD	SUITLAND	MD	207470000		
6	010000001	COOKER NAME7		7 4700 SILVER HILL ROAD	SUITLAND	MD	207470006		

- 4) Save the new spreadsheet with a meaningful name (i.e., "MARYLAND.csv").
- 5) Produce parallel spreadsheets for the remaining states, and disperse them.

Once the data is completed, and the abridged spreadsheets are returned, the location specific spreadsheets can be imported individually into the GIDS Surveyor,<sup>66</sup> or all the

<sup>63</sup> Left click with you mouse on Row 3, and drag the cursor down the field numbers.

<sup>64</sup> When the Sort's popup screen appears, select what all of the data should be sorted by (such as "Sort by" – State = Column H), and then select what you would like the sorted data sorted by ("Then by" - Zip Code = Column I); this example would sort by state, and within the sorted states the data would be sorted by ZIP Code.

<sup>65</sup> The first two rows explain the columns' contents.

<sup>66</sup> Follow the Surveyor's default import procedure to extract the furnished data. New locations can be imported as NC-99003.



parts can be consolidated before importing. **Confirm that all new Store Numbers are unique and do not match any of the established locations.**<sup>67</sup>

### **Compiling Locations:**

- 1) Open a new spreadsheet. Paste the top 2 rows of Master.csv at the top of the new spreadsheet. In our example we did not distribute CA, so we start with:

	C	D	E	F	G	H	I	J	K
1	EIN_NUM	RECORD_NAME1	RECORD_NAME2	ADDR_STREET	ADDR_CITY	ADDR_ST	ADDR_ZIP	EMP_MAR12_TOT	PAY_QTR
2	Employer Id	Label Name 1	Label Name 2	Street Address	City	State	ZIP Code	Total Employees for First Quart	
3	010000001	COOKER NAME2		2 4700 SILVER HILL	SUITLAND	CA	207470001		

- 2) Open the spreadsheet returned by Maryland or Virginia, and **Copy | Paste** the locations' data onto the new spreadsheet making sure columns are in the same order and none were added or deleted.
- 3) Adding the data from the Maryland locations to the new spreadsheet will produce:

	C	D	E	F	G	H	I	J	K
1	EIN_NUM	RECORD_NAME1	RECORD_NAME2	ADDR_STREET	ADDR_CITY	ADDR_ST	ADDR_ZIP	EMP_MAR12_TOT	PAY_QTR
2	Employer Id	Label Name 1	Label Name 2	Street Address	City	State	ZIP Code	Total Employees for First Q	
3	010000001	COOKER NAME2		2 4700 SILVER HILL	SUITLAND	CA	207470001	70	
4	010000001	COOKER NAME6		6 4700 SILVER HILL	SUITLAND	MD	207470005	12	
5	010000001	COOKER NAME3		3 4700 SILVER HILL	SUITLAND	MD	207470002	8	
6	010000001	COOKER NAME1		1 4700 SILVER HILL	SUITLAND	MD	207470000	11	
7	010000001	COOKER NAME7		7 4700 SILVER HILL	SUITLAND	MD	207470006	4	

- 4) Repeat the process for the other regions; amend the new spreadsheet with the data returned from locations around the country.

### **Parsing Data:**

If data for a specific question (such as Number of Employees) is stored at one central locality, and another question's data (such as Payroll) is stored at another locality, one may want to produce column specific spreadsheets in order to consolidate such data. Surveyor's exported default spreadsheet can be distributed around the company as is and consolidated later though **Cut** and **Paste**, or the default spreadsheet can be truncated in order to protect sensitive information. You can also import each spreadsheet separately.

**Include a chronological column of row numbers in the distributed spreadsheets in order to increase efficiency during consolidation. Use Surveyor's default export procedure to produce a spreadsheet ("Master.csv"). Insert a new column in the spreadsheet (i.e. in Column A).<sup>68</sup> Put "=1" in Cell A3, and in Cell A4 insert "=A3+1."**

<sup>67</sup> Put all locations (new and pre-listed) in one spreadsheet. Either **Sort** the data by Census File Number, and new locations will be isolated for comparison, or **Sort** by Store Number, and any duplicates will follow one another chronologically.

<sup>68</sup> Right click at the top of the spreadsheet so that Column A is highlighted. Select **Insert**, and a new Column A will be created. The initial Column A will move to Column B.

**Copy cell A4, and Paste the value down to the bottom of the initial dataset. If you have information about new locations (such as Store Number or address), put the data in the spreadsheet, and add chronological numbers for these locations. Highlight all of Column A, and Copy it. While still on Column A, select Paste Special | Values.<sup>69</sup> Save the new spreadsheet with a meaningful name.**

### **Truncating Spreadsheets by Data Elements:**

We start with the following spreadsheet:

Master.csv									
	A	B	C	D	E	F	G	H	I
1	RECORD_CFN	RECORD_EIN_NUM	RECORD_NAME1	RECORD_NAME2	ADDR_STREET	ADDR_CITY	ADDR_STATE	ADDR_ZIP	
2	Census File Number	%INDEX%	Employer Label	Label Name 1	Label Name 2	Street Address	City	State	ZIP Code
3	2934291749	0	010000001	COOKER NAME 5		5 4700 SILVER HILL ROAD	SUITLAND	MD	207470000
4	2546373637	9716	010000001	COOKER NAME 7		7 4700 SILVER HILL ROAD	SUITLAND	MD	207470000
5	2734477693	9702	010000001	COOKER NAME 2		2 4700 SILVER HILL ROAD	SUITLAND	MD	207470000
6	2224749760	9717	010000001	COOKER NAME 1		1 4700 SILVER HILL ROAD	SUITLAND	MD	207470000
7	2555600386	9778	010000001	COOKER NAME 3		3 4700 SILVER HILL ROAD	SUITLAND	MD	207470000
8	2686624263	9760	010000001	COOKER NAME 6		6 4700 SILVER HILL ROAD	SUITLAND	MD	207470000
9	2050926723	9739	010000001	COOKER NAME 4		4 4700 SILVER HILL ROAD	SUITLAND	MD	207470000

Suppose a single Human Resources department keeps records for the number of Employees (EMP\_MAR12\_TOT) at every location. Delete columns from the spreadsheet that you do not wish Human Resources to access and are not critical to the identification of locations. Inform the spreadsheet recipient that any unaccounted for locations should be included along with a chronologically increasing numbers in Column A (i.e. 11, 12, etc.). The following abridged spreadsheet is sent to Human Resources:<sup>70</sup>

Master.csv							
	A	B	C	D	E	F	G
1	My Created #s	RECORD_CFN	ADDR_STREET	ADDR_CITY	ADDR_STATE	ADDR_ZIP	EMP_MAR12_TOT
2		%INDEX%	Street Address	City	State	ZIP Code	Total Employees for March 12
3	1	0	5 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	
4	2	9716	7 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	
5	3	9702	2 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	
6	4	9717	1 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	
7	5	9778	3 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	
8	6	9760	6 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	
9	7	9739	4 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	

### **Compiling Data Specific Parsing:**

The spreadsheet Human Resources sends back is sorted in a different order, and two new locations are added.<sup>71</sup>

<sup>69</sup> Overwriting with **Copy | Paste Special | Values** will help maintain the integrity of the chronological numbering.

<sup>70</sup> Column letters are altered since some columns were deleted.

<sup>71</sup> You will need additional information for the new locations (address, store number, etc...).

Master.csv							
	A	B	C	D	E	F	G
1	My Created #s	RECORD_	ADDR_STREET	ADDR_CITY	ADDR_ST	ADDR_ZIP	EMP_MAR12_TOT
2		%INDEX%	Street Address	City	State	ZIP Code	Total Employees for March 12
3	1	0	5 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	2
4	4	9717	1 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	3
5	7	9739	4 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	15
6	12	55	NEW LOCATION	PARK CITY	CA	74152	1
7	11	66	NEW LOCATION	ADELPHI	MD	20783	11
8	2	9716	7 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	12
9	3	9702	2 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	12
10	5	9778	3 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	3
11	6	9760	6 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	2

We need to resort the data. Highlight all of the data on the returned spreadsheet,<sup>72</sup> and go to **Data | Sort**. A popup screen will appear. In the first “Sort by” list select Column A (Column A=My Created Store #s). “Ascending” should be selected. Push “OK.” Our abridged spreadsheet will now look like:

Master.csv							
	A	B	C	D	E	F	G
1	My Created #s	RECORD_	ADDR_STREET	ADDR_CITY	ADDR_ST	ADDR_ZIP	EMP_MAR12_TOT
2		%INDEX%	Street Address	City	State	ZIP Code	Total Employees for March 12
3	1	0	5 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	2
4	2	9716	7 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	12
5	3	9702	2 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	12
6	4	9717	1 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	3
7	5	9778	3 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	3
8	6	9760	6 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	2
9	7	9739	4 4700 SILVER HILL ROAD	SUITLAND	MD	207470000	15
10	11	66	NEW LOCATION	ADELPHI	MD	20783	11
11	12	55	NEW LOCATION	PARK CITY	CA	74152	1

The new locations have been isolated, so **Copy** the Column with the EMP data (Column K), and **Paste** it onto the original spreadsheet.<sup>73</sup> The chronological numbering efficiently restores the data to its original order. Follow the same procedure for any other data elements.

**Before importing, the chronological row numbering created in Column A will need to be deleted.**

**Duplicate CFNs overwrite data. Confirm that all new Store CFNs are unique and do not match any of the established locations.**<sup>74</sup>

<sup>72</sup> Left click with you mouse on Row 3, and drag the cursor down through the field numbers.

<sup>73</sup> Make sure that the new locations are associated with correct data from one spreadsheet to the next as Employment and Payroll information is combined.

<sup>74</sup> Put all locations (new and pre-listed) in one spreadsheet. Either **Sort** the data by Census File Number, and new locations will be isolated for comparison, or **Sort** by Store Number, and any duplicates will follow one another chronologically.

## **Section 5: WORKING WITH YOUR FORMS USING SURVEYOR**

### **5.1 Archiving Your Responses**

When you have completed your form(s), you should save them in a location outside of the Surveyor software for archival purposes. The most common method is to print out paper copies of forms.

To do this, follow the instructions for Printing a Form. (See Section 5.11)

As an alternative, you can save the forms to disk by selecting option File|Save Selected Form Images from the drop-down menu.

### **5.2 Certification**

You will be prompted by the Surveyor software to certify your report forms before you submit them. Please fill this page out completely and accurately in case the Census Bureau has questions concerning your report forms and data.

### **5.3 Checking a Form for Errors**

After entering all required data in a form, save the data then perform a “review.” To “Save,” click on the “Save” icon (diskette) or select File | Save from the drop-down menu. To perform a “review,” click on the “Perform Review” button located at the bottom of the “Review Panel,” located on the lower left-hand side of the form view on your screen.

Performing a “review” will determine if there are problems with data entered in the forms. Problems are listed in the “Review Panel” as either “Errors” or “Warnings” under a column heading labeled “Kind.” To the right of this column is another column labeled “Explanation,” which briefly describes the problem or corrective action needed. Highlighting an “Error” or “Warning” line then clicking on it will generate a description of the problem and the required action in a window to the right of the “Explanation” column. Click on the blue hyperlink and Surveyor will take you to the field.

The total numbers of errors and warnings is displayed in the Form Inbox.

## 5.4 Gathering Responses from Other People in Your Company

### Contributing Data

Often more than one person or group will be involved in gathering or contributing information, such as payroll data, that will be entered into multiple forms for the Annual Survey of Manufactures/Report of Organization Survey. There are a few ways to handle this data entry:

- One way is for this information to be imported from an existing Excel spreadsheet into a Surveyor form or forms. To do this, follow the instructions for “Creating an Import Map and Importing/Exporting”, Section 4.6.
- See Section 2.2, Installing Surveyor on a Network.
- See Section 4.8, Copy/Distribute Using Exported File.
- A last option (for the ASM only) is to have a person at another location, use the Surveyor software to open forms, enter data and submit individual forms they have completed.

## 5.5 Reporting Dollar Figures

Report all dollar figures in thousands of dollars. If you cannot answer a question from your company records, please estimate the answer carefully.

Example:     \$1,123,678,599  
Report:       \$1,123,679

## 5.6 Major Activity Codes (Item 5B)

When importing additional locations from a spreadsheet, into the Surveyor, please use the following codes in Column “X” of the default spreadsheet to identify the major activity of your company:

Major Activity Codes	
Code	Description
01	Agricultural production
02	Agricultural services
03	Minerals extraction/ore processing
04	Mining services/oil and gas field services

05	Utilities
06	Construction
07	Manufacturing
08	Merchant Wholesaler
09	Commission merchant/broker/agent/electronic marketer (business to business)
10	Manufacturers' sales branch/manufacturers' sales office
11	Retail
12	Transportation/public warehousing
13	Information services/publishing/telecommunications
14	Finance/insurance
15	Real estate/renting/leasing
16	Professional/scientific/technical service
17	Waste management/remediation service/administrative/support service
18	Educational service
19	Health care
20	Social assistance
21	Arts/entertainment/recreation
22	Accommodation/food service
23	Corporate/subsidiary/regional/managing office
24	Other – Specify major activity along with principal products or services in column (c1)

### 5.7 Operational Status Codes

When importing the Operational Status of your company, you must use status codes in your spreadsheet. Use the following Operational Status codes when importing data into the Report of Organization form:

In Operation	1
Temporarily or Seasonally Inactive	3
Ceased Operation	4
Sold or Leased to Another Operator	5
Other	6

Use the following Operational Status codes when importing data into the Annual Survey of Manufactures form:

In Operation	1
Under Construction, Development, or Exploration	2
Temporarily or Seasonally Inactive	3



Ceased Operation	4
Sold or Leased to Another Operator	5

## 5.8 Remarks Section

Please use the Remarks section on any form for any explanations that may be essential in understanding your reported data.

## 5.9 Reviewing Your Responses

When a form is opened, the default view includes a “Review Panel” in the lower portion of the screen. The Panel lists any form “Errors” or “Warnings” and the action required to address them. For the “Warning” or “Error” that is highlighted, its description and location in the form are listed on the right-hand side of the “Review Panel,” with hypertext that will link directly to the location of the “Error” or “Warning.” A yellow “Error/Warning” icon will appear next to the incorrect or questionable entry in the form itself.

As you correct or address each “Error” or “Warning” in a form, click on the “Save” icon or select File | Save from the drop-down menu. If the “Error” or “Warning” has been corrected properly, its notation will disappear from the “Review Panel” and the “Error/Warning” icon will disappear from that location in the form.

If no “Errors” or “Warnings” are initially shown in the review panel, click the “Perform Review” button to verify that the form contains no “Errors” or “Warnings.”

You can toggle the Review Panel on and off by clicking on **View | Review Panel**.

## 5.10 Saving Your Responses

If you open a form to add or change data, save the form data frequently by clicking on the “Save” icon or selecting File | Save from the drop-down menu.

## 5.11 Printing Survey Forms

Printing the Report of Organization

To print the Report of Organization survey forms, from the Form Inbox, put a check in the “Selected” field of any 99001, 99002, or 99003 form. The survey will print as one package.

Printing the Annual Survey of Manufactures

To print the Annual Survey of Manufactures forms, from the Form Inbox, select the form to print by clicking your mouse in the checkbox of the establishment. Click on File |

Print Selected Forms. You may also save images of your forms by selecting File | Save Selected Form Images. **Note: ASM forms print individually.**

## **Section 6: SURVEY FORMS**

### **6.1 General Information**

The purpose of the Report of Organization is to obtain an accurate and up-to-date list of your establishments, i.e., separate business locations that were in operation or new plant(s) acquired or opened during part or all of 2005. This list should include establishments of your company and each of its subsidiaries.

### **6.2 Report of Organization Survey**

#### **6.2.1 Form NC-99001 (Items 1-4 Instructions)**

##### **Item 1**

##### **Item 1(A) – Domestic company ownership or control**

If another domestic company owns more than 50 percent of the voting stock of your company or if another domestic company has the power to direct or cause the direction of your management and policies, then complete Item 1(A) by entering the name, home office address, and EIN of the owning or controlling company, and selecting the item which indicates the percentage of voting stock that it owns.

Do not list as a controlling company, the company for which you operate a franchise.

##### **Item 1(B) – Foreign company ownership or control**

If a foreign entity (company, individual, government, etc.) owns directly or indirectly 10 percent or more of the voting stock of or an equivalent interest in your company, then complete Item 1(B) by entering the name and home office address of the owning entity, and selecting the item which indicates the percentage of voting stock that it owns.

Note that indirect ownership occurs when a foreign entity has ownership in your company through another U.S. company. A foreign entity's percentage of indirect ownership in a given U.S. company is the product of the direct ownership percentage of the foreign entity in the first U.S. company in the ownership chain times that first company's direct ownership percentage in the second U.S. company in the ownership chain times each succeeding direct ownership percentage of each intervening U.S. company in the ownership chain between the foreign entity and your company.

All direct and indirect ownership interests held by the foreign entity in your company must be summed to determine the foreign entity's percentage of ownership.

### **Item 1 (c) – Foreign Affiliates**

If your company owns 10 percent or more of the voting stock or other equity rights of a foreign business enterprise (including an unincorporated branch, partnership, or ownership of real estate), then select “Yes” in Item 1C. Otherwise, select “No.”

### **Item 2 – Research and Development**

The purpose of this item is to determine if your company conducts research and development.

### **Item 3 – Employees From A Professional Employer Organization**

The purpose of this item is to determine if your company leases more than fifty percent of its permanent full- and part-time workforce from a Professional Employer Organization.

**Note:** Permanent workforce excludes temporary staffing from a staffing service and contractors.

### **Item 4 – Certification**

Please complete Certification in Item 4, and you will also be prompted by the Surveyor software to certify your report forms before you submit them. Please fill this out completely and accurately in case the Census Bureau has questions concerning your report forms and data.

## **6.2.2 Form NC-99002**

### **Item 5A – Pre-Identified Locations of Operations**

For your convenience, we have included in Item 5A on Form 99002, information for your establishments that you previously reported to the Census Bureau. **Do not duplicate establishments previously listed in Item 5A, or plants for which you received an MA-10000 form.** You will also have the opportunity to add all NEW establishments in Item 5B on Form 99003. See Section 3.5 for details.

For pre-listed establishments, please bring the information up-to-date by making the necessary corrections and entering or importing the requested information.

### **Operational Status**

If you select a status of “Ceased Operation”, “Sold”, or “Leased”, you will need to enter the Effective Date. In addition, if you select a status of “Sold” or “Leased”, please enter the name and the location of the new owner.

Provide the number of employees and payroll for each establishment (including part-year operations) in business during any part of 2005.

### **Number of employees for the pay period including March 12**

Report all employees, both full- and part-time and employees working under a contractual co-employment arrangement whereby employees are provided by a professional employer organization. i.e. leased employees. Include as employees all persons on paid sick leave, paid holidays, and paid vacations; include salaried officers and executives of incorporated firms. Exclude any temporary employees brought on for a limited duration to supplement the permanent work force (only if they are employees of the temporary help company).

### **Payroll**

Include payroll of full- and part-time employees and payroll expenses for employees working under a contractual leased employment arrangement with a professional employer organization.

The total of wages paid, tips reported, and other compensation paid to your employees in the calendar year, whether or not subject to income or social security taxes. Include all wages, salaries, commissions, fees, bonuses, vacation allowances, sick leave pay, severance pay, the amount of reported tips, and the value of taxable fringe benefits. Also include any employee contributions to a qualified pension plan, such as the 401(k) plan. Also include the spread on stock options that are taxable to employees as wages. For incorporated businesses, include the salary of all officers and executives.

Exclude pensions, annuities, supplemental unemployment compensation benefits, nontaxable fringe benefits, and commissions and fees paid to independent contractors. Also, exclude employer contributions for pension plans, health insurance, and qualified benefits under a cafeteria plan. For unincorporated businesses, exclude the profit or compensation paid to proprietors or partners.

The sum of payroll reported for individual establishments for an EIN should equal the taxable medicare wages and tips reported on item 7a of IRS form 941, Employer's Quarterly Federal Tax Return plus the payroll expense portion of the fee paid to a professional employer organization as part of a contracted leased employment agreement.

### **Discontinued Operations**

If your organization discontinued operations before 2005, please return the signed report with an annotation in the Remarks section that your organization did not operate in any part of 2005. If your organization did operate in any part of 2005, we require a report for the portion of the year in which your organization was in operation.

## **Special Instructions for Selected Industries**

### **Agricultural production**

Establishments having any agricultural production regardless of whether it is the major activity should be listed separately in items 5A and/or 5B and the employment and payroll data allocated if appropriate. Agricultural production includes the raising of/or production of crops (including horticultural products), poultry, or livestock for sale.

When using Item 5B to add establishments engaged in agricultural production, be sure to give the type of crops, livestock, etc. in column (c1).

### **Construction establishment**

A construction establishment is a relatively permanent office, or other place of business, where the usual business activities related to construction are conducted. With some exceptions, a relatively permanent office is one which has been established for the management of more than one project or job and which is expected to be maintained on a continuing basis.

Therefore, each construction project or site should not be considered a construction establishment. Instead list as establishments only those relatively permanent construction or branch offices directly responsible for work at these sites.

### **Banks**

When checking the pre-listing of your establishments in Item 5A or listing additional establishments in Item 5B, list only the EINs used to report either Federal employment taxes (IRS Form 941) or income (IRS Forms 1065, 1120, and 990). **DO NOT LIST** EINs assigned to trust funds or estates by the bank and reported on IRS Form 1041, U.S. Fiduciary Income Tax Return. Report main and branch locations as separate establishments. Individual ATM outlets should not be listed as separate establishments.

### **Retail departments or concessions**

List as a separate establishment (including specific street address) those retail or service outlets operated by your firm as a department of a retail or service establishment, such as shoe departments or beauty salons in department stores, meat or bakery departments in grocery stores, or millinery departments in clothing stores.

### **Medical**

Part-time offices should not be considered as separate establishments. List only the offices which are staffed on a full-time basis and include the employment and payroll for

the part-time offices. Home health care services should not consider the customers' locations as separate establishments. Employment and payroll for these locations should be included with the main or branch office from which the work is supervised.

## Legal

Part-time, temporary, or special offices should not be considered separate establishments for purpose of this report. Data for such locations should be included with the controlling main or branch location where the service is primarily performed.

### **6.2.3 Form NC-99003**

#### **Item 5B – Additional Locations of Operations**

Please add any NEW or missing establishments in operation during part of 2005 that were not included in the previously reported establishments in 5A on Form 99002. You can add a new establishment or multiple establishments by clicking on the “Add Location(s)” icon, on the toolbar or by selecting Tools | Add Location(s) from the drop-down menu.

For each establishment, enter the Employer ID Number (EIN), store or plant number (if any), name and address, and major activity.

#### **Number of employees for the pay period including March 12**

Report all employees, both full- and part-time and employees working under a contractual co-employment arrangement whereby employees are provided by a professional employer organization. i.e. leased employees. Include as employees all persons on paid sick leave, paid holidays, and paid vacations; include salaried officers and executives of incorporated firms. Exclude any temporary employees brought on for a limited duration to supplement the permanent work force (only if they are employees of the temporary help company).

#### **Payroll**

Include payroll of full- and part-time employees and payroll expenses for employees working under a contractual leased employment arrangement with a professional employer organization.

The total of wages paid, tips reported, and other compensation paid to your employees in the calendar year, whether or not subject to income or social security taxes. Include all wages, salaries, commissions, fees, bonuses, vacation allowances, sick leave pay, severance pay, the amount of reported tips, and the value of taxable fringe benefits. Also include any employee contributions to a qualified pension plan, such as the 401(k) plan.



Also include the spread on stock options that are taxable to employees as wages. For incorporated businesses, include the salary of all officers and executives.

Exclude pensions, annuities, supplemental unemployment compensation benefits, nontaxable fringe benefits, and commissions and fees paid to independent contractors. Also, exclude employer contributions for pension plans, health insurance, and qualified benefits under a cafeteria plan. For unincorporated businesses, exclude the profit or compensation paid to proprietors or partners.

The sum of payroll reported for individual establishments for an EIN should equal the taxable medicare wages and tips reported on item 7a of IRS form 941, Employer's Quarterly Federal Tax Return plus the payroll expense portion of the fee paid to a professional employer organization as part of a contracted leased employment agreement.

### **Special Instructions for Selected Industries**

#### **Agricultural production**

Establishments having any agricultural production regardless of whether it is the major activity should be listed separately in items 5A and/or 5B and the employment and payroll data allocated if appropriate. Agricultural production includes the raising of/or production of crops (including horticultural products), poultry, or livestock for sale.

When using Item 5B to add establishments engaged in agricultural production, be sure to give the type of crops, livestock, etc. in column (c1).

#### **Construction establishment**

A construction establishment is a relatively permanent office, or other place of business, where the usual business activities related to construction are conducted. With some exceptions, a relatively permanent office is one which has been established for the management of more than one project or job and which is expected to be maintained on a continuing basis.

Therefore, each construction project or site should not be considered a construction establishment. Instead list as establishments only those relatively permanent construction or branch offices directly responsible for work at these sites.

#### **Banks**

When checking the pre-listing of your establishments in Item 5A or listing additional establishments in Item 5B, list only the EINs used to report either Federal employment taxes (IRS Form 941) or income (IRS Forms 1065, 1120, and 990). DO NOT LIST EINs assigned to trust funds or estates by the bank and reported on IRS Form 1041, U.S. Fiduciary Income Tax Return. Report main and branch locations as separate establishments. Individual ATM outlets should not be listed as separate establishments.

## Retail departments or concessions

List as a separate establishment (including specific street address) those retail or service outlets operated by your firm as a department of a retail or service establishment, such as shoe departments or beauty salons in department stores, meat or bakery departments in grocery stores, or millinery departments in clothing stores.

## Medical

Part-time offices should not be considered as separate establishments. List only the offices which are staffed on a full-time basis and include the employment and payroll for the part-time offices. Home health care services should not consider the customers' locations as separate establishments. Employment and payroll for these locations should be included with the main or branch office from which the work is supervised.

## Legal

Part-time, temporary, or special offices should not be considered separate establishments for purpose of this report. Data for such locations should be included with the controlling main or branch location where the service is primarily performed.

## **6.3 Annual Survey of Manufactures**

### **Form MA-10000 and MA-10001**

The purpose of the Annual Survey of Manufactures is to provide key intercensal measures of manufacturing activity, products, and location for the public and private sectors. The ASM provides the best current measure of current U.S. manufacturing industry outputs, inputs, and operating status, and is the primary basis for updates of the Longitudinal Research Database (LRD). The LRD is used by Census Bureau staff and academic researchers on sworn agent status for microdata analysis.

### **Item 1 – Months In Operation**

Please indicate the number of months that this establishment was in business during 2005. If this establishment was not in operation in 2005, then check the “Check if None” box and go to Item 29.

### **Item 2 – Employer Identification Number**

If the Employer Identification Number (EIN) for this plant is different than the one currently displayed, please correct it. This information is needed so the Census Bureau can avoid sending duplicate report forms for the same location. Our file of new business

formations is based on the EINs issued each year. However, we exclude mailing report forms to new EINs if we identify them as belonging to existing respondents.

### **Item 3 – Physical Location**

Information on the physical location of each establishment is needed to prepare the tabulations of manufacturing activity in each state, county, and city. Please be certain to review the displayed address and make any necessary corrections or additions.

### **Item 4 – Sales, Shipments, Receipts, or Revenue**

Item 4, line A – Total Value Of Products Shipped And Other Receipts – This value should equal the value reported in Item 22, code 7700000.

Item 4, line B – Value of Products Exported

1. General instructions – Report as exports those shipments going directly for export including shipments to foreign subsidiaries or foreign divisions of your company and their affiliates. INCLUDE as sales for export, shipments of your products to export firms and to other customers who will export the items. Export sales should not include products which will be further manufactured, fabricated, or assembled in this country before being shipped to foreign customers. Please note that the breaking down of bulk shipments of your products into smaller lots or packages by a wholesale exporter or by other units of your company is not considered to be further manufacturing, fabricating, or assembly. Shipments to customers in the Panama Canal Zone, the Commonwealth of Puerto Rico, and United States possessions are considered exports.
2. Government sales – Sales to the United States Government to be shipped to foreign nations under military and economic assistance programs are considered exports. Sales to the United States Government overseas are not classified as exports. Shipments of bunker fuels and other supplies and equipment for United States vessels and planes engaged in foreign trade are not classified as exports.

Item 4, line C – Shipments To Other Domestic Plants Of Your Company For Further Assembly, Fabrication, Or Manufacture

Please report separately the value of products which are transferred to other manufacturing plants of your company for further processing. (Do not include products that are shipped to or on order from your company sales or wholesale offices since such products are then sold to customers outside your company.) The value assigned to products transferred to other plants of your company should include not only the direct cost of production but also a reasonable portion of other costs (company overhead) and profits.

## **Item 5 – E-Shipments**

E-commerce sales are online orders accepted for manufactured products from customers; including shipments to other domestic plants of your own company for further assembly, fabrication, or manufacture where price and terms of sale are negotiated, over an Internet, Extranet, Electronic Data Interchange (EDI) network, electronic mail, or other online system. Payment may or may not be made online.

## **Item 6 – Employment and Payroll**

Item 6, part A – Number of Employees – Report employees, both full- and part-time whose payroll was reported on Internal Revenue Service Form 941, Employer's Quarterly Federal Tax Form Return and employees whose payroll was paid to a professional employer organization as part of a co-employment arrangement for all or part of the pay period, including March 12, May 12, August 12, and November 12.

INCLUDE all persons on paid sick leave, paid holidays, and paid vacation during these pay periods. EXCLUDE members of Armed Forces and pensioners carried on your active rolls. INCLUDE officers at this establishment, if a corporation. If an unincorporated concern, EXCLUDE proprietor or partners.

The following types of food processing establishments should exclude agricultural workers or fishing crews from this report:

- Sugar mills which are part of sugar plantations;
- Fruit or vegetable canning or freezing plants with farms associated with their operations;
- Fish canning, freezing or packaging plants with fishing operations associated with the plant.

### **Item 6, part A, lines 1 (a-d) and line 2- Number of Production Workers**

Include workers (up through the line-supervisor level) engaged in fabricating, processing, assembling, inspecting, receiving, packing, warehousing, shipping (but not delivering), maintenance, repair, janitorial, guard services, product development, auxiliary production for plant's own use (e.g., powerplant), recordkeeping, and other closely associated services. INCLUDE truck drivers delivering ready-mixed concrete. EXCLUDE proprietors and partners.

### **Item 6, part A, line 3 – Average Annual Production Workers**

Divide the total on line 2 by 4 and enter the results on line 3. Divide by 4 even if you did not operate in all four periods (omit fractions).

### **Item 6, part A, line 4 – All other employees for pay period including March 12**

Include nonproduction personnel, including those engaged in the following activities: supervision above line- supervisor level, sales (including driver/salesperson), sales delivery (truck drivers and helpers), advertising, credit, collection, installation and servicing of own product, clerical and routine office functions, executive, purchasing, finance, legal, personnel (including cafeteria, etc.), professional and technical. EXCLUDE proprietors and partners.

Item 6, part B, lines 1(a-c) – Annual Payroll – (Exclude supplemental labor costs)

Report the payroll which was included on Internal Revenue Service Form 941, Employer's Quarterly Federal Tax Form Return and the payroll portion of the fee paid to a professional employer organization as part of a co-employment arrangement, INCLUDE such deductions as employee's Social Security contributions, withholding taxes, group insurance premiums, union dues, and savings bonds. INCLUDE in gross earnings: commissions, dismissal pay, paid bonuses, employee contributions to pension plans such as 401(k), vacation and sick leave pay, and the cash equivalent of compensation paid in kind.

INCLUDE salaries of officers of this establishment, if a corporation; if an unincorporated concern, exclude payments to proprietors or partners. EXCLUDE payments to agricultural employees, fishermen, members of the Armed Forces, and pensioners carried on your active payroll.

Item 6, part B, line 2 – First Quarter Payroll – (January – March 2005) (Not applicable to single-establishment companies)

Item 6, part C – Employer's Cost For Fringe Benefits (Annual supplemental labor costs)  
INCLUDE:

Legally required payments for all programs required under Federal and state legislation:

- Federal Old Age and Survivors' Insurance
- Unemployment compensation
- Workers' compensations
- State temporary disability payments for establishments located in Rhode Island, California, New York, and New Jersey Payments for voluntary programs not specifically required by Federal or state legislation whether initiated by the employer or established as a result of a collective bargaining contract

INCLUDE employer's cost for fringe benefits costs paid to a professional employer organization as part of a co-employment arrangement. Employer payments to programs financed jointly by employer and employee contributions. Include employer payments for:

- Insurance premiums on hospital and medical plans

- Life insurance premiums
- Premiums on supplementary accident and sickness insurance

In reporting payments for insurance, report net payments (i.e., gross payments less any offsetting dividends, refunds, or other reductions in premiums). Report payments or allocations for:

- All pension plans regardless of method of administration
- Supplemental unemployment compensation plans
- Welfare plans
- Stock purchase plans in which the employers' payment is not subject to withholding tax
- Deferred profit sharing plans

The items listed above are generally considered as deferred rather than current income to employees and are not subject to withholding of income tax. If the payments or allocations by the company are made to a fund, do not report payments to employees out of these funds. However, include payments made directly to retired employees or their survivors that do not pass through a fund.

**EXCLUDE:**

- Annual payroll and first quarter payroll (from Item 5, part B)
- Expenditures not of the type listed above such as losses on company operated cafeterias and snack bars, cost of in-plant medical services, cost of free parking lots, discounts on employee purchases, cost of uniforms and other work clothing supplied to employees, and similar expenditures
- "Fringe benefits" such as payments for holidays, vacations, sick pay, bonuses, unused vacation, jury pay, night shift bonus, suggestion awards, and the payment on profit sharing and special stock purchase plans subject to withholding tax. Report this category of benefits as payroll in Item 5, part B.

If any of the items are maintained in your records only at the company level, allocate their costs to the manufacturing establishment. You may distribute the total on the basis of the ratio of the payroll of each manufacturing establishment to the total company payroll unless you have developed your own method of making such allocations. Specify the method used and the approximate portion that has been allocated in the "REMARKS" section (following item 11).

Item 6, part D – Number of Hours Worked By Production Workers (ANNUAL)



INCLUDE all hours worked or paid for, except hours paid for vacations, holidays, or sick leave. If an employee elects to work during the vacation period, report only actual hours worked by such employee. Overtime hours should be reported as actual hours worked and not as straight-time equivalent hours. Include hours worked by co-employees as part of a co-employment arrangement with a professional employers organization.

#### **Item 10 – Inventories of this Establishment at the end of Year (Report Both Years)**

Report the value of all inventories owned by this establishment regardless of where the inventories are held. If this establishment is part of a multiple-establishment company, the company should assign to each establishment those inventories that the establishment is responsible for as if it owned them. For example, in completing the report of a manufacturing establishment or sales branch, INCLUDE those inventories that are attributable to its operations, even if the inventories are held elsewhere, e.g., at a warehouse operated by your company or in a public warehouse. Those inventories of an operating establishment held elsewhere should not be shown on the report of the warehouse where they are actually stored. Inventories should not be duplicated on establishment reports.

Report inventories at cost or market using generally accepted accounting methods. In reporting total inventories and inventories by stage of fabrication for inventories valued on LIFO (Item 10, lines A-D), use the sum of the LIFO value plus the LIFO reserve. Thus, the total inventories reported in Item 10, line D should equal the sum of Item 10, lines E(1), F(1) and F(2). Note that the LIFO reserve is the difference between the current cost (e.g., FIFO) of inventories (gross value) and the LIFO carrying value (net value). If you calculate the LIFO carrying value of inventories by specific goods LIFO (unit LIFO), please estimate the current cost of inventories for the purpose of determining the LIFO reserve.

#### **Item 12 – Capital Expenditures**

Item 12, part A – Capital expenditures for new and used depreciable assets in 2005

If the establishment changed ownership during the year, see special instructions.

The intent of this item is to compile information on the buildings, structures, and equipment used directly or indirectly by the establishment to produce the goods and services reported in Item 22, Detail of Sales, Shipments, Receipts, or Revenue.

Report all outlays during the year for buildings and equipment that are chargeable to the fixed asset account and for which depreciation or amortization reserves are maintained. NOTE – If any building or equipment has been acquired this year under a capital lease, please report the cost (at the market value) as a capital expenditure. Do not report the periodic payments made to the lessor. If the lease qualifies as an operating lease, do not

include the value of the building and equipment as capital expenditures. Also, do not report the periodic payments made to the producer or the lessor as capital expenditures.

**INCLUDE:**

- Capital expenditures (outlays) during the year that were actually made during the year, not the final value of equipment put in place or the buildings completed during the year.
- Add the cost of additions completed during the year to the construction in progress at the beginning of the year to compute capital expenditures for long-term projects in process.
- Capital improvements and new additions in progress are considered assets, as well as capital expenditures.
- Capital expenditures during the year for new construction whether on contract or by your own work force
- Value of all machinery and equipment, buildings, and capitalized improvements and repairs whether purchased or produced by employees of your own company
- Value of any machinery and equipment or structure transferred to the use of this establishment by the parent company or one of its subsidiaries

**EXCLUDE:**

Tools that are expensed. Report these in Item 15, line A1, Cost of Materials, Parts, Containers, Packaging, Etc., Used.

**Buildings and Other Structures**

**INCLUDE:**

- Elevators, blast furnaces, brick kilns, fractionation towers, ship ways and similar structures, as well as the usual factory, office, and warehouse-type of buildings
- Equipment that is an integral part of the building or structure, such as elevators, overhead traveling cranes, ventilating shafts, and fractionation towers

- Capitalized site improvements, such as roads, tracks, parking lots, fences, and utilities

**EXCLUDE:**

The value of land on which the structures stand

**Machinery and Equipment**

**INCLUDE:**

- All production machinery (motors, lathes, punch presses, etc.) and transportation equipment (automobiles, trucks, etc.)
- All office equipment and machines; computers; furniture and fixtures for offices, cafeterias, and dressing rooms; and warehouse equipment
- Replacements as well as additions to new capacity

Item 12, part B – Breakdown of expenditures for new and used machinery and equipment by type (Reported in item 12, part A, line 2)

Item 12, part B, line 1 – Automobiles, trucks, etc., for highway use

INCLUDE purchases of vehicles which are purchased for your company for highway use and vehicles acquired under a lease-purchase agreement.

EXCLUDE vehicles leased or vehicles normally designed to transport materials, property, or equipment on mining, construction, petroleum development, and similar projects. These vehicles are of such size or weight as to be normally restricted by State laws or regulations from operating on public highways.

Item 12, part B, line 2 – Computers and peripheral data processing equipment

Report all purchases of computers and related equipment.

**Item 15 – Selected Expenses**

Item 15, part A – Selected production related costs

If materials, parts, and supplies are received from other establishments of your company, costs should be checked against the values reported for the plant producing and transferring the goods. The value should be “economic value,” i.e., include in addition to

the producing plant's direct cost of production a reasonable proportion of all other costs (company overhead) and profits. Freight and other direct handling charges should be added.

Item 15, line A1 – Cost of materials, parts, containers, packaging, etc.

The delivered cost figures reported on line A1 should cover all raw materials, containers, scrap, and supplies, etc., which were: (a) put into production, (b) used as operating supplies, and (c) used in repair and maintenance. If this establishment has products made elsewhere under contract and supplies the materials, report the cost of those materials on line A1. Include the value of the specific products made in Item 22, Detail of Sales, Shipments, Receipts, or Revenue. The amounts paid to other establishments for contract work should be reported on line A5 and should include also the freight charges for shipping the materials to the contract producer and the finished products to you. INCLUDE only physical goods used or put into production. Report total cost of the materials actually consumed or put in production during the year. If book records are inadequate, estimates may be made from purchases and other records. However, if purchases during the year do not significantly differ from the amounts actually used, purchase figures may be used in lieu of actual consumption. If for any major items consumption differs significantly from purchases, estimate consumption by adding beginning inventories to the amount purchased and subtracting end-of-year inventories for the item.

Cost is *delivered* cost – i.e., the amount paid or payable after discounts and including freight and other direct charges incurred by the establishment in acquiring the materials. Include all materials received for consumption, i.e., purchases from other companies, transfers from other establishments of your own company, and withdrawals from inventories. If the establishment produces items subsequently consumed in further production, report cost of original materials consumed only.

**Special Note:** If any of these types of materials are transferred from other establishments of your company, please include their full economic value on line A1. The “economic value” would include costs of production and delivery and a proportionate share of overhead and profits. Cooperatives which have not yet made a final settlement with the growers should include a carefully prepared estimate of the expected amount payable for each kind of produce put into production during survey year. EXCLUDE services used or overhead charges, such as advertising, telephone, telegram and cable, insurance, development and research, services of engineering, management, marketing and other professional consultants, etc., unless charges for such services are included in the prices paid for materials.

EXCLUDE overhead items such as depreciation charges against plant and equipment; rent and rental allowances; interest payments, royalties, and patent fees. EXCLUDE materials, supplies, machinery, and equipment which were used in the construction of new structures or additions to your plant, or new machinery and equipment, and that are chargeable to fixed assets accounts. (These should be reported in Item 12.)

EXCLUDE products purchased and resold without further manufacture processing or assembly; their costs should be reported on line B.

Item 15, line A2 – Cost of products bought and sold as such without further processing

Report the cost of all products bought and resold in the same condition as when purchased and not made part of another product manufactured by this establishment. (Total sales value of all products sold should be reported in Item 22, Code 00099989006).

Item 15, line A3 – Cost of purchased fuels consumed for heat, power, or the generation of electricity

Report the total amount actually paid or payable during the year for all fuels consumed for heat, power, or the generation of electricity. Do not include the estimated cost of fuels, such as sawdust or blast furnace gas, produced as a by-product of your manufacturing activities. INCLUDE anthracite and bituminous coal, coke, natural and manufactured gas, fuel oil, liquefied petroleum gas, gasoline, and all other fuels including purchased steam. For selected industries, such as Carbon Black, Blast Furnaces, and Coke Ovens, some of the above fuel types may be used as raw materials as well as being consumed as fuels. In such cases, the cost of these fuel types used as raw materials should be reported in line A1. Be sure to include fuel used to power onsite trucks, fork lifts, or other motor vehicles associated with the establishments. The cost of these fuel types used as fuels should be reported on line A3.

Item 15, line A4 – Cost of purchased electricity

Report the total amount actually paid or payable for electric energy purchased during the year from other companies, or received from other establishments of your company. Exclude the value of electricity generated and used at this establishment.

Item 15, line A5 – Cost of work done for you by others on your materials

If any contract work was done by others on materials furnished by your establishment, report the total payments made during the year for such work, including freight out and in. EXCLUDE the cost of materials worked on, which should be reported on line A1.

Item 15, part B – Quantity of Electricity

All quantities for electricity should be reported in thousands of kilowatthours.

Item 15, line B1 – Purchased electricity

Report the quantity of electricity for which cost is reported in Item 15, line A4.

#### Item 15, line B2 – Generated electricity

Report the total quantity of electric energy generated in this plant (gross less generating station use) during the year although part of such energy may have been sold or transferred. When totals are reported on this line, data relating to the activity of the power stations would also be included in other sections of this report. For example, the number of employees assigned to the power station, their wages, and hours should be included in the figures reported in Item 6; and the cost of fuels used to generate electricity, in Item 15, line A3.

#### Item 15, line B3 – Electricity sold or transferred to other establishments

Enter the quantity of electric energy, which was also included in Item 15, line B1, or line B2, which was sold to other companies or transferred to other manufacturing or non-manufacturing establishments of your company. The corresponding value of electricity sold or transferred should be included in miscellaneous receipts (Item 22, Code 000999 8000 5).

### ITEM 22 – Detail of Sales, Shipments, Receipts, or Revenue

Please read the following instructions closely before completing this item.

Use the grid to select a product, and then provide the dollar value of products shipped for that product in the current year edit. The product list contains products for which you provided responses in 2005 (known as “prelisted” products) and some special product categories that apply for all plants.

There are three buttons you can use to maintain this list of products:

**Add product code** – The add product code is a convenient way to search and select a product code. There are thousands of products included in this electronic survey, and the add product window provides an easy way to search through this list. (See Section 4.5 for additional instructions on adding product codes).

**Add write-in** – If you are unable to find a product code in the product list, you may select ‘0000001’ and enter a description in the write-in field. Click on “Add”. Select a product code from the drop-down menu or click on the binoculars icon, beside the drop-down menu to search for a product code.

**Delete product** – You can not remove prelisted products. You can only delete those products which you have added. To do so, first select the product to delete. Secondly, click the delete button.

1. General Instructions – INCLUDE products made elsewhere for this establishment on a contract basis from materials supplied by this establishment. (The cost of these materials should be reported in Item 15, line A1. Value should be net



selling value f.o.b. plant after discounts and allowances. EXCLUDE freight charges and excise taxes.

Sales of products bought and resold without further processing should be reported separately in Item 22, Code 000999 8900 6, “Resales”. (The cost of resales should be reported in Item 15, line A2). Although the instructions have not been changed from those that were previously used for this item, we want to clarify the reporting of imported products. If imported products (including products made by your foreign affiliates) are sold without further manufacture, processing, or assembly by your domestic plants, they should be reported on the line for “Resales” and not included with specific products made at the domestic reporting establishment.

We also want to clarify the instructions for marketing high cost office and production equipment by leasing them rather than selling them. If you follow this marketing practice, REPORT in Item 22 the value of goods marketed under a lease as if you had sold them:

- a. In Item 22, report as value of shipments the equivalent market value of the goods.  
(The terms of the lease may use the present discounted value or some other method.)
- b. Do not report any rental receipts from leases outstanding.

## 2. Specific Instructions (for Reporting Value of Shipments by Product Class in Item 22)

NOTE: The product class codes appear with eleven digits. The first ten digits represent the product class; the eleventh digit is used by the Bureau of the Census in our computer operations to mechanically verify the accuracy of the first seven digits. In Item 9 of each form MA-10000 (MA-10000 (L)), the Census Bureau has preprinted the product class codes and description of the products reported by the establishment in the prior survey year.

Please review the entire list before completing the inquiry. A Special Reporting Instructions Sheet (MA-10000-R (1-25)) is included with each questionnaire. The sheets list product class codes and descriptions that are primarily manufactured by establishments classified in specific NAICS industry groups. Please review the sheet to assist in locating product class codes and descriptions. If you cannot locate the description of any products that you produce, please enter a description of your products in column (a) and enter their values in column (c) on the form.

Report separately for each major kind of product. Please note that some of the preprinted product classes in Item 22 have an asterisk (\*) at the end of the description. The product classes ending with an asterisk are “tielines” to the Current Industrial Reports (CIR). The Annual Survey of Manufactures (ASM) utilizes the tieline method for reporting summary information in the ASM where detailed information is being reported for the same period in a CIR. In this instance, the product detail that is collected monthly,

quarterly, or annually in the CIR is not duplicated in the ASM. Instead, a single (tieline) product class code is collected in the ASM that corresponds to the sum of the detail appearing in the CIR.

Value data reported in Item 22 should be cross-referenced to the data reported on the CIR questionnaires to verify consistency. In the prior year column, we also have printed the data available in our files. These figures may differ from those actually reported by you because of changes made by the Bureau of the Census as a result of correspondence with your company or a comparison with previous data reported for the establishment. Please review the previous year figures and make any necessary corrections. If you have any questions, please call 1-800-233-6136. You may also visit the MA-10000 help web site at [www.census.gov/econhelp](http://www.census.gov/econhelp)

### **Item 29 – Operational Status**

This Item is to be completed on the Annual Survey of Manufactures Form 10000 and Form 10001. Select one of the six operational status options for your establishment(s). If you select a status of “Ceased operation”, “Sold”, or “Leased” you will be prompted for the Effective Date. In addition, if you select a status of “Sold” or “Leased” you will be also prompted for the EIN, name, and location of the new owner.

Please fully complete this item. Accurate completion of this item will avoid unnecessary correspondence, as well as reduce the possibility of your receiving more than one report form for the manufacturing activity at this location.

## **Section 7: CONTACT INFORMATION**

### **7.1 Software/Technical Assistance**

Please refer questions regarding the operation of this software to the help desk staff at 1-800-838-2640. Please keep your questions related to the software when dialing this phone number. The hours of operation are Monday through Friday, 7:30 a.m. to 4:00 p.m. Eastern Standard Time. You may also email us at our Business Help site at [www.census.gov/econhelp](http://www.census.gov/econhelp).

### **7.2 Non-Technical Assistance (or assistance with survey data entries)**

If you have questions about the forms or survey questions (data items), please call 1-800-233-6136.

## **Section 8: BUSINESS HELP SITE**

### **8.1 Online Services**

Online services allows you to perform certain processes, i.e. requesting time extensions, on your own. To access the following online services, go to our Business Help Site located at [www.census.gov/econhelp](http://www.census.gov/econhelp). Click on a report form. Click on Online Services.

#### **8.1.1 Filing Status**

Check which report forms we have received from your company and which report forms we have not received from your company by following the instructions in **8.1**.

#### **8.1.2 Re-mailing Forms**

Order replacements for lost or misplaced report forms. To do so, follow the instructions in **8.1**. **Note: If you received electronic software only and would like to receive paper forms, access our Business Help Site at [www.census.gov/econhelp](http://www.census.gov/econhelp). Click on the report form you wish to receive via paper, “Electronic Reporting”, and then “Online Services”.**

#### **8.1.3 Time Extensions**

Request additional time to complete your report forms. To do so, follow the instructions in **8.1**.

#### **8.1.4 Frequently Asked Questions**

##### **Annual Survey of Manufactures FAQ’s**

For a complete list of frequently asked questions regarding the Annual Survey of Manufactures, please visit our Business Help site at <http://www.census.gov/econhelp>. Click on the Annual Survey of Manufactures link.

##### **Report of Organization FAQ’s**

For a complete list of frequently asked questions regarding the Report of Organization, please visit our Business Help site at <http://www.census.gov/econhelp>. Click on the Report of Organization link.

## **Section 9: SURVEY SECURITY**

### **9.1 Internet Security**

The U.S. Census Bureau is mandated by various Federal laws to ensure the security and confidentiality of data collected from respondents regardless of the means used for the data collection activity. To meet the requirements of these laws, as well as Census Bureau policies and regulations pertaining to Internet use, a three level security system including encryption, authentication, and a firewall are used at the Census Bureau.

The end to end transfer of data via the Internet is highly secure. Secure Socket Layer (SSL) sets up a secure and encrypted link between your Web browser and our Web server. You will know you are securely connected by the URL which will begin with "https". This SSL connection is protecting either the posting of data to the Web server or the retrieval of data from the Web server. In addition to encrypting data transmissions, our Web server identifies the user and the data they must access (authentication and authorization). This is why your user name and password are required to access our Web server.

For additional information about the measures taken at the Census Bureau to ensure the security of Internet use, please visit [www.census.gov/main/www/privacy.html](http://www.census.gov/main/www/privacy.html) and view our Privacy Statement.

## **9.2 TITLE 13, U.S. CODE**

### **Mandatory Reporting and Confidentiality**

#### **AUTHORITY TO CONDUCT SURVEYS**

##### **182. Surveys**

The Secretary may make surveys deemed necessary to furnish annual and other interim current data on the subjects covered by the censuses provided for in this title.

##### **214. Wrongful disclosure of information**

Whoever, being or having been an employee or staff member referred to in subchapter II of chapter 1 of this title, having taken and subscribed the oath of office, or having sworn to observe the limitations imposed by section 9 of this title, publishes or communicates any information, the disclosure of which is prohibited under the provisions of section 9 of this title, and which comes into his possession by reason of his being employed (or otherwise providing services under the provisions of this title, shall be fined not more than \$5,000 or imprisoned not more than 5 years, or both.

#### **MANDATORY PROVISIONS OF LAW -- SECTION 224 AND 225**

**224. Failure to answer questions affecting companies, businesses, religious bodies, and other organizations; false answers.**

Whoever, being the owner, official, agent, person in charge, or assistant to the person in charge, of any company, business, institution, establishment, religious body, or organization of any nature whatsoever, neglects or refuses, when requested by the Secretary or other authorized officer or employee of the Department of Commerce or bureau or agency thereof, to answer completely and correctly to the best of his knowledge all questions relating to his company, business, institution, establishment, religious body, or other organization, or to records or statistics in his official custody, contained on any census or other schedule or questionnaire prepared and submitted to him under the authority of this title, shall be fined not more than \$500; and if he willfully gives a false answer to any such question, he shall be fined not more than \$10,000.

## PROTECTION OF CONFIDENTIAL INFORMATION -- SECTIONS 9 AND 221

### 9. Information is confidential

(a) Neither the Secretary, nor any other officer or employee of the Department of Commerce or bureau or agency thereof, may, except as provided in section 8 or chapter 10 of this title -

(1) use the information furnished under the provisions of this title for any purpose other than the statistical purposes for which it is supplied; or

(2) make any publication whereby the data furnished by any particular establishment or individual under this title can be identified; or

(3) permit anyone other than the sworn officers and employees of the Department or bureau or agency thereof to examine the individual reports. No department, bureau, agency, officer, or employee of the Government, except the Secretary in carrying out the purposes of this title, shall require, for any reason, copies of census reports which have been retained by any such establishment or individual. Copies of census reports which have been retained shall be immune from legal process, and shall not, without the consent of the individual or establishment concerned, be admitted as evidence or used for any purpose in any action, suit, or other judicial or administrative proceeding.

### 225. Applicability of penal provisions in certain cases

(a) In connection with any survey conducted by the Secretary or other authorized officer or employee of the Department of Commerce or bureau or agency thereof pursuant to subchapter IV of chapter 5 of this title, the provisions of sections 221, 222, 223, and 224 of this title shall apply -

(1) with respect to the answering of questions and furnishing of information, only to such inquiries as are within the scope of the schedules and questionnaires and of the type of character heretofore used in connection with the taking of complete censuses under subchapters I and II of chapter 5 of this title, or in connection with any censuses hereafter taken pursuant to such subchapters;

(2) only after publication of a determination with reasons therefore certified by the Secretary, or by some authorized officer or employee of the Department of Commerce or bureau or agency thereof with the approval of the Secretary, that the information called for is needed to aid or permit the efficient performance of essential governmental functions or services, or has significant application to the needs of the public, business, or industry and is not publicly available from nongovernmental or other governmental sources;

(3) in the case of any new survey, only after public notice, given by the Secretary or other authorized officer or employee of the Department of Commerce or bureau or agency



thereof at least thirty days in advance of requesting a return, that such survey is under consideration.

(b) The provisions for imprisonment provided by section 222 of this title shall not apply in connection with any survey conducted pursuant to subchapter II of chapter 3 of this title, or to subchapter IV of chapter 5 of this title.

(c) The provisions of sections 221, 222, 223, and 224 of this title shall not apply to any censuses or surveys of governments provided for by subchapters III and IV of chapter 5 of this title, nor to other surveys provided for by subchapter IV of such chapter which are taken more frequently than annually.

(d) Where the doctrine, teaching, or discipline of any religious denomination or church prohibits the disclosure of information relative to membership, a refusal, in such circumstances, to furnish such information shall not be an offense under this chapter.

### **9.3 Warning Concerning Electronic Mail**

The Internet is not a secure means of transmitting information unless it is encrypted. If you choose to communicate with the Census Bureau via electronic mail (e-mail), the Census Bureau cannot guarantee the privacy of the information while transmitted, but will safeguard it once received in accordance with Title 13. Be advised that making inquiries regarding these surveys via electronic mail may divulge your participation in this survey.

**Please note: Information sent via e-mail from the Business Help Site is also fully encrypted. However, our reply to your e-mail will not be. You must decide if you want to assume the risk that an unauthorized person may gain access to our reply. We will not e-mail specific information about your business as part of our reply. If your request involves such information, we will call you at the phone number you provide.**

**The above warning pertains to e-mails sent over the Internet only. Data files transmitted to the Census Bureau are encrypted and secure. For more information see Internet security.**

## APPENDIX A

### IMPORT ERRORS AND WARNINGS

#### Import Errors and Warnings

##### Errors

*While attempting to save the imported data, an unhandled exception occurred, Message: "Exception"*

*"Import terminated at 02/13/2005 12:48:30"* This message should never appear. If it does, there is likely a hardware problem on your computer.

*"The spreadsheet you specified doesn't exist"*. Normally, this message won't happen, since the wizard won't let you proceed unless it can find the spreadsheet file. However, getting this error could mean a hardware issue or, if you are reading from a network drive, that the network is experiencing problems.

*"Specified import map file "mymapfile.gmf" does not exist. Import terminated at 02/13/2005 12:14:17"*.

The map file you specified doesn't exist. Normally, this message won't happen, since the wizard won't let you proceed unless it can find the map file. However, getting this error could mean a hardware issue or, if you are reading from a network drive, that the network is experiencing problems.

*"Additional Reporting Unit index identifier column is not set in import map file "mymapfile.gmf". Import terminated at 02/13/2005 12:48:30"*.

If you are attempting to import into certain form sections, you will need to specify an index so that the importing system knows which section you are attempting to import. Normally, this message should not occur, however, if you used the import mapping wizard to create your own maps, you may have forgotten to set the sequence index in that map.

To set the sequence index, open your import map and make certain this field has an entry: *"Specified Import map file "mymapfile.gmf" does not indicate which column to use for Store/Plant number. The Store/Plant number is the primary key used for importing, and is required. Import terminated at 02/13/2005 12:14:17"*. The import system has to have a way of knowing what establishments you are importing into. Normally, this error will not occur, however, if you created a custom map you may have saved the map without setting the search data element.

##### Warnings which cause a single field to be skipped

*Mapped field "A\_DATA\_ELEMENT" exceeds maximum length n and was skipped.*

Responses have maximum lengths. If you attempt to import a value that is longer than the software can accept for this field, you will get this message.

*Mapped field "A\_DATA\_ELEMENT" does not exist in the your database for Store/Plant number "9999999999" and was skipped.*

Not all forms have all the data elements. You have specified an establishment with a value mapped to a field that doesn't exist in that particular form.

*Mapped field "A\_DATA\_ELEMENT" contains invalid characters and was skipped.*

Responses have value which are valid and not valid. This message could mean that you attempted to assign a text value to a number.

### **Warnings which cause an entire row to be skipped**

There are a few potential problems that can occur with data in your import spreadsheets. When Surveyor encounters problematic data during the importing process, you will receive a Warning that explains what is wrong with the data. Below are examples of three common Warnings.

1. *The Additional Reporting Unit index "zz" is invalid. Spreadsheet/CSV row skipped.*

Indexes specified for reporting repeating groups or sub-forms must be numbers. So, make sure the indexes use only numbers and contain no other types of characters.

2. *The Additional Reporting Unit index 99999 is out of range. Spreadsheet/CSV row skipped.*

The range for your Additional Reporting Units is based on the number of Additional Reporting Units. So, if you have 100 Additional Reporting Units, the range is 1-100.

Because of the out-of-range index number, you cannot add items to a repeating group section at this time. You have to add the sections first and then import the data into them.

3. *The Store/Plant number "9999999999" is not unique in the your database. Spreadsheet/CSV row skipped*

For some reason, the Store/Plant number that you named in your import spreadsheet exists more than once in the list of establishments. Check your

spreadsheet and find any Store/Plant numbers that you have used more than once. Change the second occurrence of the number to a new number.

## **APPENDIX B**

### **GLOSSARY OF TERMS**

#### **Annual Survey of Manufactures (ASM)**

The ASM provides the best measure of current U.S. manufacturing industry outputs, inputs, and operating status, and is the primary basis for updates of the Longitudinal Research Database (LRD). The LRD is used by Census Bureau staff and academic researchers on sworn agent status for microdata analysis.

#### **Census File Number (CFN)**

A Census File Number has been assigned to establishments of your company and appears on several forms (MA-10000, NC-99001, and NC-99002). Always refer to the complete number in any correspondence with the Bureau of the Census in order to expedite a reply.

#### **Company or firm**

A business unit such as a sole proprietorship, partnership, corporation, cooperative, investment trust, a branch of a foreign entity, etc., including both profit and nonprofit organizations.

#### **Company Organization Survey (COS)**

Another name for the Report of Organization survey. See definition for “Report of Organization” in this glossary.

#### **Employer Identification Number (EIN)**

The EIN is the nine-digit taxpayer identification number assigned by the Internal Revenue Service and used by all business firms and other legal entities to file Federal employment tax returns such as forms 941, 943, and Federal income returns such as forms 1065, 1120, 1120S, and 990 series.

#### **Establishment**

An establishment is a single physical location where business is conducted or where services or industrial operations are performed. (For example: a factory, mill, store, hotel, movie theater, mine, farm, administrative office.) If distinctly separate activities are performed at the same location, and if there is significant employment in each activity, then each activity should be treated as a separate establishment, except as explained below. (For example: construction activities operated out of the same physical location as a lumber yard.)

For firms engaged in construction, real estate management or operation, transportation, communication, electric, gas, and sanitary services, and similar types of physically dispersed activities, it is not necessary to list separately each individual " site," "project," " field," " network," "line," or "system." It is only necessary to report for main or branch offices, terminals, stations, etc., which are either (a) directly responsible for supervising such activities, or (b) the base from which personnel operate to carry out these activities.

### **Subsidiary**

A company which is owned or controlled by another firm or company. Subsidiaries include firms in which your company owns more than 50 percent of the outstanding voting stock, as well as firms in which your company has the power to direct or cause the direction of the management and policies.

### **Company Ownership or Control**

If another domestic company owns more than 50 percent of the voting stock of your company or if another domestic company has the power to direct or cause the direction of your management and policies, then complete item 1A1 by entering the name, home office address, EIN of the owning or controlling company, and complete item 1A2 by marking (X) the box which indicates the percentage of voting stock that it owns.

**Note: Do not list as a controlling company, the company for which you operate a franchise.**

If a foreign entity (company, individual, government, etc.) owns directly or indirectly 10 percent or more of the voting stock of or an equivalent interest in your company, then complete item 1B by entering the name and home office address of the owning entity, and marking (X) the box which indicates the percentage of voting stock that it owns. All direct and indirect ownership interests held by the foreign entity in your company must be summed to determine the foreign entity's percentage of ownership.

### **Foreign Affiliates**

If your company owns 10 percent or more of the voting stock or other equity rights of a foreign business enterprise (including an unincorporated branch, partnership, or ownership of real estate), then mark (X) the box labeled "Yes" in the item 2. Otherwise, mark (X) the box labeled "No."

### **Certification**

The process of disclosing information about the person reporting data to the Census Bureau. This process is required prior to sending your responses, so that we may contact you concerning your responses if we have a need. You will find the Certification in Item 4 of the NC-99001 form and during the Submit process. Please complete Certification in both places.

## **NAICS**

The North American Industry Classification System (NAICS) is an industry classification system that groups establishments into industries based on the activities in which they are primarily engaged. It is a comprehensive system covering the entire field of economic activities, producing and nonproducing. There are 20 sectors in NAICS and 1,170 industries in NAICS United States.

## **Operational Status**

The status of your establishment's operation at the end of 2005. For a description of the 2005 operational status codes, see Section 5.7 of this guide.

## **Major Activity Code**

The code that best describes the major activity of your establishment. For a list of major activity codes, see Section 5.6 of this guide.

## **Months in Operation**

The number of months an establishment was in operation in 2005.

## **Report of Organization (COS)**

The purpose of the COS is to obtain current organization and operating information on multi-establishment firms in order to maintain the Census Bureau's list of businesses. The United States Code, Title 13, authorizes this survey and provides for mandatory responses.

The assemblage of Forms 99001, 99002, and 99003 comprise the Report of Organization survey. Also known as the Company Organization Survey (COS).



## APPENDIX C

### State Abbreviations

Use these abbreviations when inputting data into the “State” field on your survey form(s).

Alabama	AL	Oklahoma	OK
Alaska	AK	Oregon	OR
Arizona	AZ	Pennsylvania	PA
Arkansas	AR	Rhode Island	RI
California	CA	South Carolina	SC
Colorado	CO	South Dakota	SD
Connecticut	CT	Tennessee	TN
Delaware	DE	Texas	TX
District of Columbia	DC	Utah	UT
Florida	FL	Vermont	VT
Georgia	GA	Virginia	VA
Hawaii	HI	Washington	WA
Idaho	ID	West Virginia	WV
Illinois	IL	Wisconsin	WI
Indiana	IN	Wyoming	WY
Iowa	IA	Northern Marianas	MP
Kansas	KS	Virgin Islands	VI
Kentucky	KY	Guan	GU
Louisiana	LA	American Samoa	AS
Maine	ME	Canal Zone CZ (Zip Co	
Maryland	MD	Trust Territories	TT
Massachusetts	MA	Foreign	ZZ (Zip Code = 00000)
Michigan	MI	Ships At Sea	YY (Zip Code = 00000)
Minnesota	MN	Puerto Rico	PR
Mississippi	MS	Atlantic Offshore	AT (Zip Code = 00000)
Missouri	MO	Northern Gulf of Mexico	NG (Zip Code = 00000)
Montana	MT	Pacific Offshore	PC (Zip Code = 00000)
Nebraska	NE	Military Post	AA
Nevada	NV	Military Post	AE
New Hampshire	NH	Military Post	AP
New Jersey	NJ		
New Mexico	NM		
New York	NY		
North Carolina	NC		
North Dakota	ND		
Ohio	OH		

## **APPENDIX D**

### **SURVEYOR FREQUENTLY ASKED QUESTIONS**

#### **How do I sort in the Form Inbox?**

Please refer to section number 3.3, “*How do I sort in the Form Inbox?*” of this guide.

#### **What is that funny little red lock-looking thing?**

Please refer to section number 3.9 , “*Lock Status*”, of this guide.

#### **"An error occurred in the application..."**

In rare circumstances, you may receive a pop-up message indicating a serious problem within the Surveyor software. The message box, titled "*Surveyor.exe*," will note that an error has occurred in the Surveyor application. In this message screen, click on the option "mail bug report" to send a bug report to the Bureau of the Census. Then click on the "close application" button.

There are several steps you can take to help prevent this problem:

- If you see this message box, run “check for updates” to see if the problem has already been fixed.
- Use the **mail bug report** option to send the entire error log to our help desk. Please include what you were doing prior to receiving this message so we can replicate the problem and eliminate it.
- Call our Electronic Reporting Help Desk at 1-800-838-2640. Monday - Friday between 7:30 a.m and 4:00 p.m. EST.

Most times, it is safe to re-open Surveyor and begin work again. If you receive the same error message again, contact the Electronic Reporting Help Desk.

#### **What are the hardware and system requirements?**

Please refer to section number 1.3 , “*System Requirements*”, of this guide.

#### **Why isn't this value automatically calculated anymore?**

Surveyor automatically computes some totals from the sum of detail items. Consider item A (the total) which should equal the sum of Item B + Item C. If you key or import values into B and C, Surveyor calculates the total and enters it into A.

If you later key or import a value into A which differs from the calculated total, Surveyor will preserve the total you enter. A message will appear in the Review Panel, to alert you

that the sum of the details is different from the reported total. Hit the ESC key to reactivate the autosum.

### **What does 'Check for Updates' mean?**

Please refer to section number 3.1 , “*Checking for Updates*”, of this guide.

### **Why didn't my values import?**

If your data didn't import as expected, check the import log files. An import log file is generated after each import. You can view import logs by selecting File | View Import Log from the drop-down menu in Surveyor.

Please also refer to Appendix A, “*Import Errors and Warnings*”, of this guide. **Note:** *The values in italics are examples only.*

## **APPENDIX E TROUBLESHOOTING**

### **An Error Has Occurred in the Application ...**

In rare circumstances, you may receive a pop-up message indicating a serious problem within the Surveyor software. The message box, titled "Surveyor.exe," will note that an error has occurred in the Surveyor application. In this message screen, click on the option "mail bug report" to send a bug report to the Bureau of the Census. Then click on the "close application" button.

There are several steps you can take to help prevent this problem:

- If you see this message box, run check for updates to see if the problem has already been fixed.
- Use the mail bug report option to send the entire error log to our help desk. Please include what you were doing prior to receiving this message so we can replicate the problem and eliminate it.
- Call our help desk at 1-800-838-2640. Monday - Friday between 7:30 a.m and 4:00 p.m. EST.

Most times, it is safe to re-open Surveyor and begin work again. If you receive the same error message again, contact the Electronic Reporting Help Desk.

### **Clearing Warnings or Error Flags**

If a warning or error flag does not disappear after you've corrected a problem and have clicked "Close" or "Perform Review", click "Save" to clear the warning or error flag(s).

### **Download Problems**

#### **User Unable to Access Data Files**

The protocol for https runs on port 443 which allows the user to access and download the data files. If you have a firewall, you will need to allow communications through it on that port. If you are unable to access the data files using that port, you may need a newer browser that supports 128 bit encryption.

#### **ERROR MESSAGE: "Handle is in the wrong state ..."**

If you receive this error message, please call the Electronic Reporting Help Desk

or visit the Technical Frequently Asked Questions on our Business Help Site for assistance.


## **Help Desk**


### Software Questions

Please refer questions regarding the operation of this software to the help desk staff at 1-800-838-2640. Our hours of operation are Monday through Friday, 7:30 a.m. to 4:00 p.m. Eastern Standard Time. You may also contact us at our Business Help site at [www.census.gov/econhelp](http://www.census.gov/econhelp). Please keep your questions related to the software.

If you have questions about the forms or survey questions (data items), please call 1-800-233-6136.

## **Unlocking a Locked Form**

To unlock forms with a  symbol, go to Tools | Force Selected Surveys Unlocked, then close and restart the Surveyor. If the files remain locked, delete the LockFile.lck file from the Program Files | Census | Surveyor | Userid subdirectory. Close, then restart the Surveyor. (For Internet users, the subdirectory name is the user's UID. For CD-ROM users, the subdirectory name is usually DefaultUser#.)

To unlock forms with a  lock symbol, have the user to unlock forms by deleting the LockFile.lck and sm\_cache files under Program Files | Census | Surveyor | Userid subdirectory while Surveyor is open. Close, then reopen Surveyor. (For Internet users, the subdirectory name is the user's UID. For CD-ROM users, the subdirectory name is usually DefaultUser#.)

**Note: If you have difficulty locating Program Files, search under Windows Explorer or My Computer.**